

Army Regulation 135–7

Army National Guard and Army Reserve

Incentive Programs

**Headquarters
Department of the Army
Washington, DC
15 April 1996**

UNCLASSIFIED

SUMMARY of CHANGE

AR 135-7

Incentive Programs

Change 15. This change--

- o Implements the provisions of Public Law 102-484, 23 October 1992, Public Law 103-160, 30 November 1993, and Public Law 103-337, 5 October 1994, pertaining to incentives and entitlements for Selected Reserve service by extending to 30 September 1996, the authorization for entitlement, reenlistment, and affiliation bonuses and the Health Professionals Loan Repayment Program.
- o Changes the method of payment of the enlistment bonus; authorizing an enlistment bonus of up to \$5,000.
- o Requires the MOS and grade to have been attained while on active duty to qualify for the prior service enlistment bonus.
- o Changes the anniversary payment of the affiliation bonus to the 6th anniversary date.
- o Waives the continued Selected Reserves service requirement for Montgomery GI Bill entitlements.
- o Provides for educational assistance under the Montgomery GI Bill beyond the baccalaureate degree level.
- o Clarifies a soldier's incentive entitlements on transfer between Reserve Components of the Army.
- o Clarifies the status of a soldier's incentives and entitlements on unit inactivation, relocation, reduction in force, or reduction in overstrength.
- o Implements revised Selected Reserve Montgomery GI Bill policy and procedures.
- o Revises DA Form 5261-R, DA Form 5261-2-R, DA Form 5261-3-R, DA Form 5261-4-R, DA Form 5261-5-R, DA Form 5435-R, DA Form 5447-R, and DA Form 5642-R.

Change 14. This change--

- o Provides that CG, ARPERCEN, supervise the incentive programs pertaining to IRR, IMA and USAR AGR soldiers (para 1-5e).
- o Defines NPS, PS, and in-service categories for incentive entitlements (para 1-5.1)1.
- o Specifies the time frame for meeting SRIP educational requirements (para 1-7.1).
- o Announces SLRP and HLRP payments are reported as taxable income (para 1-13).

- o Explains status of incentives and entitlements on unit deactivation or relocation (para 1-14.1).
- o Explains flags for failure to meet body fat content or APFT failure will not suspend or terminate incentive payments (para 1-16d).
- o Clarifies reinstatement procedures for resumption of incentive payments following a period of nonavailability (para 1-16).
- o Specifies termination of an incentive will not affect a soldier's service requirement (para 1-17).
- o Extends the eligibility for SLRP to the Drill Sergeant Program (para 1-21).
- o Extends bonus and HPLRP authorization to 30 Sep 93 (paras 2-1, 2-1.1, 4-1, 5-1, and 7-1).
- o Effective 1 Jul 92 authorizes \$2,000 for enlistment in a high priority unit (para 2-2a).
- o Effective 1 Apr 93 reduces bonus for authorized MOS to \$1,500 and offers \$2,000 for enlistment in bonus MOS that is in a bonus unit (para 2-2a).
- o Excludes glossary NPS from enlistment bonus eligibility (para 2-3b).
- o Clarifies enlistment bonus termination on movement to a non bonused MOS or unit (para 2-6b).
- o Incorporates a prior service enlistment bonus (chap 2.1).
- o Authorizes reenlistment bonus eligibility in an MOS immaterial position (para 4-3e).
- o Explains affiliation payment processing will begin on signing the agreement and on assignment to a unit and clarifies the fifth anniversary date (para 5-2a).
- o Permits Regular Army soldiers coded with SPD KGF to contract for the affiliation bonus (para 5-2c).
- o Requires the soldier be the student to qualify for repayment of a PLUS loan (para 5.1-2b).
- o Explains that once \$10,000 is established for the SLRP it cannot be increased (para 5.1-2e).
- o Clarifies the SLRP incentive is offered for specified MOS or units as authorized by HQDA (para 5.1-2e).
- o Provides for pro-rate loan repayments if terminated by entry on AD or unit deactivation or relocation (para 5.1-2f).

- o Permits a soldier being released from active duty with a remaining MSO to immediately enlist in the USAR to qualify for the SLRP (para 5.1-3b).
- o Provides the SLRP agreement (DA Form 5261-4-R) remains in force regardless of subsequent reenlistments or extensions until separation from the Selected Reserve or attaining the maximum authorized limits (para 5.1-10).
- o Expands the loans authorized for repayment under the HPLRP (para 7-2a).
- o Revises the specialties authorized under the HPLRP (para 7-3f).
- o Requires the MGIB statement of understanding to be filed in the soldier's OMPF (para 8-3a).
- o Denies Selected Reserve MGIB entitlement to soldiers serving on AD or FTNGD (para 8-3c).
- o Permits soldiers with baccalaureate degrees to contract for educational assistance for undergraduate programs (para 8-3.1).
- o Incorporates provisions for vocational/technical educational assistance under the MGIB (para 8-3.1).
- o Cites increased Selected Reserve MGIB rates during the period 1 Oct 91 thru 30 Sep 93 (para 8-5c).
- o Clarifies MGIB termination policy (para 8-7.1) and expiration of entitlement policy (para 8-8).
- o Provides procedures for reaffiliation in the MGIB (para 8-8.1).
- o Clarifies FTNGD is active duty for entitlement under the MGIB 2x4 (para 9-3a).
- o Cites increased MGIB 2x4 rates during the period 1 Oct 91 thru 30 Sep 93 (para 9-3).
- o Cites increased MGIB for AD rates during the period 1 Oct 91 thru 30 Sep 93 (para 10-2a).
- o Clarifies FTNGD is active duty for entitlement under the MGIB for AD (para 10-3a).
- o Clarifies periods of service that are not considered initial periods of service under the MGIB (para 10-3c).
- o Revises the bonus and loan repayment agreement forms;
- o Makes minor administrative corrections and changes.

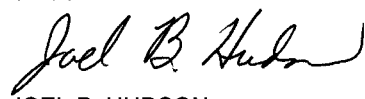
Army National Guard and Army Reserve

Incentive Programs

By Order of the Secretary of the Army:

DENNIS J. REIMER
General, United States Army
Chief of Staff

Official:



JOEL B. HUDSON
Administrative Assistant to the
Secretary of the Army

History. This publication was originally printed on 1 February 1984. This printing publishes a Change 15. This publication has been reorganized to make it compatible with the Army electronic publishing database. No content has been changed.

Summary. This regulation establishes a single reference for incentives authorized within the Army National Guard and the Army Reserve. It incorporates the latest changes to applicable Headquarters, Department of the Army National Guard All States Letters previously published

separately. This regulation covers incentive benefits, and identifies eligibility criteria and entitlement, termination, suspension, and recoupment requirements.

Applicability. This regulation applies to the Army National Guard and the United States Army Reserve. It does not apply to the Active Army or the Delayed Entry Program of the Regular Army. This regulation will be in effect during mobilization.

Proponent and exception authority. The proponent of the regulation is the Deputy Chief of Staff for Personnel. The proponent has the authority to approve exceptions to this regulation that are consistent with controlling law and regulation. Proponents may delegate the approval authority, in writing, to a division chief under their supervision within the proponent agency who holds the grade of colonel or the civilian equivalent.

Army management control process. This regulation is subject to the requirements of AR 11-2. It contains internal control provisions but does not contain checklists for conducting internal control reviews. These checklists have been developed and appear in DA Circular 11-87-5.

Supplementation. Supplementation of

this regulation and establishment of command and local forms are prohibited without prior approval from HQDA (DAPE-MPA), WASH DC 20310-0300.

Interim changes. Interim changes to this regulation are not official unless they are authenticated by the Administrative Assistant to the Secretary of the Army. Users will destroy interim changes on their expiration date unless sooner superseded or rescinded.

Suggested Improvements. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to ATTN DAPE-MPE DEPUTY CHIEF OF STATE FOR PERSONNEL, 300 ARMY PENTAGON, WASHINGTON DC 20310-0300.

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Chapter 1

General

Section I

Introduction

1-1. Purpose

a. This regulation prescribes policies and procedures for the administration of the Army National Guard (ARNGUS) and the United States Army Reserve (USAR) incentive programs. These programs include the—

- (1) Selected Reserve Incentive Program (SRIP). The SRIP offers:
 - (*a*) Enlistment bonus.
 - (*b*) Educational assistance.
 - (*c*) Reenlistment/extension bonus.
 - (*d*) Affiliation bonus.
 - (*e*) Repayment of student loans.
 - (*f*) Health Professionals Loan Repayment (HPLR) Program.
- (2) Individual Ready Reserve (IRR) Bonus Program.
- (3) Inactive National Guard and Individual Ready Reserve Bonus Program.
- (4) Educational Assistance Program for Members of the Selected Reserve (Montgomery GI Bill).
- (5) Basic Educational Assistance Entitlement for Service in the Selected Reserve (Short Title: Montgomery GI Bill 2 X 4 Program).
- (6) Educational assistance for service on active duty (AD) in an Active Guard Reserve (AGR) status (Montgomery GI Bill).
- (7) New Specialized Training Assistance Program for Medical Corps and Army Nurse Corps Officers (New STRAP).

b. Policy contained in this regulation has been in effect since 1 Oct 83, except as otherwise indicated in the text.

1-2. References

Required and related publications and forms are listed in appendix A.

1-3. Explanation of abbreviations and terms

Abbreviations and special terms used in this regulation are explained in the consolidated glossary.

1-4. Policy

a. The Secretary of the Army (SA) has authorized the use of the incentives described in this regulation. These incentives serve as an extraordinary measure to assist the ARNGUS and USAR in meeting and sustaining manpower requirements.

b. Incentives also contribute to quality and skill-match objectives, and help to stabilize the ARNGUS and USAR through longer service commitment.

c. Incentives will be used to support early deploying units, critical shortage skills, and shortages in the IRR. Headquarters, Department of the Army (HQDA), Office, Deputy Chief of Staff for Personnel (ODCSPER), will announce the effective date of program adjustments.

d. Unit selection for incentives coverage will be based on the Department of the Army Master Priority Listing (DAMPL) and announced by HQDA.

(1) The DAMPL has two features.

(*a*) It is an extract of ARNGUS and USAR units from the Forces Command (FORSCOM) Intensive Management Force List (IMFL).

(*b*) It is a management tool for allocating resources to achieve readiness objectives.

(2) There are priority force packages in the DAMPL designed to fill the requirements for a wartime contingency.

(*a*) ARNGUS and USAR units assigned to designated priority groups in the DAMPL receive enlistment and reenlistment incentives.

(*b*) Unit mission changes may necessitate changes in a unit's eligibility for incentives.

(*c*) Dual mission units which fall in multiple priority groups may receive incentives based on the highest category assigned.

(*d*) The affiliation bonus (chap 5) is potentially available to any unit and skill in the ARNGUS and USAR.

(*e*) Following FORSCOM coordination with the National Guard Bureau (NGB) and Office of the Chief, Army Reserve (OCAR), HQDA, Office, Deputy Chief of Staff for Military Operations and Plans (ODCSOPS) approves the DAMPL for publication and distribution by ODCSPER, HQDA.

e. Skill selection for incentive coverage is based on a military occupational specialty (MOS) review performed under

ODCSPER guidance. Changes to skills (additions or deletions) will be published by HQDA(DAPE-MPA or DAPE-MPO for STRAP).

(1) The incentive skill list will be updated by HQDA and reviewed by the Assistant Secretary of the Army (ASA (M&RA)) annually before the start of each FY.

(2) ODCSPER will conduct a midyear review and analysis to evaluate changes for recommendation to ASA as appropriate.

(a) The United States Army Recruiting Command (USAREC) will review the enlistment MOS for the USAR.

(b) FORSCOM will review the reenlistment MOS for the USAR.

(c) NGB will review enlistment and reenlistment MOS for the ARNGUS.

(d) Army Reserve Personnel Center (ARPERCEN) will review the skills for the IRR incentives.

1-5. Responsibilities

a. HQDA ODCSPER exercises Army Staff responsibility for policy governing the various ARNG and USAR incentives. This is accomplished by—

(1) Developing policy, or making changes to policy, in coordination with the NGB, OCAR, FORSCOM, USAREC, ARPERCEN, Defense Finance and Accounting Service (DFAS), and the Office of the Surgeon General (OTSG).

(2) Coordinating with and forwarding program guidance and goals to the NGB, OCAR, OTSG, FORSCOM, and USAREC.

(3) Approving, modifying, and submitting to the SA recommended changes to the various incentive programs.

(4) Maintaining liaison with other Services.

(5) Monitoring management indicators developed by NGB, OCAR, OTSG, FORSCOM, and USAREC to measure the effectiveness of the various programs.

(6) Providing coordinated responses to inquiries from the field, the Congress, the White House, and the Army Board for Correction of Military Records (ABCMR), concerning the incentive programs.

(7) Reviewing NGB and OCAR budget requests for the incentive program before budget submission.

(8) Submitting reports required by the Office of the Secretary of Defense (OSD), the Office of Management and Budget (OMB), and the Congress.

(9) Providing guidance concerning program report preparation to NGB, FORSCOM, USAREC, ARPERCEN, and DFAS.

(10) Conducting a semi-annual review of the incentive programs.

(11) Monitoring and evaluating the effectiveness of the incentives in achieving overall objectives.

b. HQDA ODCSOPS has Army Staff responsibility in coordination with NGB, OCAR and FORSCOM for establishing mobilization priority categories used to identify units for incentive eligibility according to guidance provided by ASA (M&RA).

c. Chief, National Guard Bureau (CNGB) exercises staff supervision and management of the incentive programs as they pertain to ARNG soldiers. CNGB, will—

(1) Develop detailed budget submissions.

(2) Develop policies, procedures and management initiatives for the ARNG and recommend to Department of the Army (DA) ODCSPER changes in program policies and procedures.

(3) Coordinate fiscal operation of ARNG incentive programs within appropriation limits.

(4) Maintain current incentive eligibility status of units.

(5) Collect personnel data as required.

(6) Prepare reports as required.

(7) Provide input to ODCSOPS concerning unit priorities.

(8) Exchange program related information with DFAS.

(9) Develop and use appropriate advertising for the ARNG incentive programs.

(10) Evaluate the effectiveness of the ARNG incentive programs.

d. Chief, Army Reserve (CAR) is the appropriations director for USAR incentive programs. The CAR exercises staff supervision and management of the incentive programs as they pertain to USAR soldiers. The CAR will—

(1) Prepare detailed budget submissions, in coordination with ODCSPER.

(2) Coordinate the fiscal operation of the USAR incentive programs within appropriation limits.

(3) Develop and recommend to ODCSPER changes in incentive program policies and procedures.

(4) Provide input to ODCSOPS concerning selection of units for incentive eligibility in coordination with FORSCOM.

(5) Maintain the current incentive eligibility status of units on the USAR Force Data File.

e. Commanding General (CG), ARPERCEN will—

(1) Collect personnel data as directed by ODCSPER.

(2) Prepare program reports required by ODCSPER.

- (3) (*Rescinded.*)
- (4) (*Rescinded.*)
- (5) Recommend to ODCSPER changes in program policies and procedures.
- (6) Exchange program-related information with DFAS.
- (7) (*Rescinded.*)
- (8) Supervise the operation of incentive and entitlement programs pertaining to IRR, IMA, and USAR AGR soldiers.
- f. CG, FORSCOM, will—
 - (1) Supervise the operation of the USAR incentive programs pertaining to retention.
 - (2) Develop initiatives for the USAR incentive program and recommend to ODCSPER changes in programs policies and procedures.
 - (3) Prepare program-related USAR reenlistment incentive reports required by ODCSPER.
 - (4) Provide, and update as necessary, an official list of incentive eligible units and subunits to ODCSOPS, ODCSPER, OCAR, USAREC, and DFAS. On approval by ODCSOPS, this list will be the single source document for determining unit incentive eligibility.
 - (5) Provide input to USAREC concerning the development and use of proper advertising for the USAR incentive programs.
 - (6) Evaluate the effectiveness of the incentive and entitlement programs on USAR troop program unit (TPU) retention.
 - (7) Disseminate information on the New STRAP to subordinate commands.
- g. CG, USAREC, will—
 - (1) Recommend to ODCSPER and FORSCOM changes in incentive program policies and procedures.
 - (2) Prepare program-related USAR enlistment incentive reports required by ODCSPER.
 - (3) Develop appropriate advertising for USAR incentives in coordination with ODCSPER and FORSCOM.
 - (4) Evaluate the effectiveness of the incentive programs as enlistment incentives for the USAR.
 - (5) Supervise the operation of the incentive programs pertaining to enlistment in the USAR.
- h. (*Rescinded.*)
- i. (*Rescinded.*)

Section II

General Policies and Procedures

1–5.1. Personnel status for incentives or entitlements

Incentives and entitlements prescribed by this regulation may specify that an applicant be in a nonprior service (NPS), prior service (PS), or inservice status. They may also mandate the completion of specified initial entry training (IET). To ensure compliance with public law and Department of Defense directives which have been incorporated in this prescribing regulation, these terms have been defined in the consolidated glossary. In the event of any conflict in these definitions with other Department of the Army directives, this regulation takes precedence.

1–6. Retroactive proviso

This regulation updates certain provisions in effect for earlier FY's incentive programs. Soldiers who entered into agreements under an earlier incentive program will continue to participate. This will be according to their contractual agreement and the provisions of this regulation where applicable. This regulation does NOT change the basic benefits of earlier incentive programs. Total incentive amount and anniversary payment schedule specified in the applicable original incentive agreement executed at the time of such enlistment, reenlistment, extension, or affiliation are unchanged. Retroactive entitlement or reinstatement based on the revised or amended policy contained in this regulation is NOT authorized.

1–7. Position vacancy requirements

- a. Selected Reserve incentives will be offered in designated units and selected skills only when a valid position vacancy exists. Valid position vacancies are either current or projected from the unit's organization tables. These tables include—
 - (1) Tables of Organization and Equipment (TOE).
 - (2) Tables of Distribution and Allowances (TDA).
 - (3) Modification Table of Organization and Equipment (MTOE).
 - (4) Modification Table of Distribution and Allowances (MTDA).
- b. (*Rescinded.*)
- c. Valid position vacancies may also be either current or projected from a unit's approved wartime required shortage list. For the purpose of this regulation, the term "wartime required shortage" is used instead of the term "authorized

overstrength” referenced in other Army publications. The authorizations affected and approved for fill are based on component-wide wartime required shortages.

1-7.1. Educational requirements

a. The enlistment bonus, and the Student Loan Repayment Program (SLRP) incentives may be granted to a soldier who meets the required eligibility criteria and who has the credentials of a secondary school graduate per d below.

(1) Soldiers who elect the enlistment bonus and/or the SLRP incentives and are attending school at the time of enlistment must have the credentials of a secondary school graduate within the time frame shown below.

(a) Alternate Training enlistment option: prior to entry on the second phase (Phase II) of initial active duty for training (IADT).

(b) Other than Alternate Training enlistment option: prior to entry on IADT.

(2) Soldiers who do not have the credentials of a secondary school graduate within the established time frame will be subject to termination of the enlistment bonus and/or SLRP.

b. *(Rescinded.)*

c. *(Rescinded.)*

d. For the purpose of educational requirements for the enlistment bonus and the SLRP, the definition of a secondary school graduate is limited to the following:

(1) High School Graduate—High School Diploma: A diploma issued to a soldier who has attended and completed a 12-year or grade day program of instruction. The diploma must be issued from the school where the individual completed all the program requirements.

(2) High School Graduate—Adult Education Diploma: A secondary school diploma awarded on the basis of attending and completing an adult education or ‘external’ diploma program, regardless of whether the diploma was issued by a state or by a secondary or postsecondary educational institution.

(3) Alternate Credential Holder—Test Based Equivalency Diploma: A diploma or certificate of general education development (GED) or other test-based high school equivalency diploma. This includes statewide testing programs such as the California High School Proficiency Examination (CHSPE), whereby examinees may earn a certificate of competency or proficiency. A State or locally issued secondary school diploma obtained solely on the basis of such equivalency testing is not to be considered a high school diploma.

(4) Alternative Credential Holder—Home Study Diploma: A secondary school diploma or certificate typically awarded by a state, based upon certification by a parent or guardian that an individual completed his or her secondary school education at home.

1-8. Personnel movement between ARNGUS and USAR

Except as prescribed by paragraph 1-14.1, a soldier’s eligibility for continued bonus, loan repayment, and educational assistance when transferring between the ARNGUS and USAR is prescribed in the appropriate chapter of this regulation which administers the incentive or entitlement.

1-9. Personnel gains from other services

Applicants for ARNG or USAR enlistment, who are currently Selected Reserve members of other Armed Services, should be counseled before enlistment processing. They should be told that entitlement to an incentive authorized for Selected Reserve members of other Armed Services will not be continued in force after enlistment in the ARNG or USAR and discharge from the current Armed Service.

1-10. Obligation

Eligibility for any incentive governed by this regulation requires that—

a. An officer, warrant officer, or enlisted soldier must enter into a contractual obligation to serve satisfactorily for the full term of service specified for an incentive program.

b. *(Rescinded.)*

1-11. Required documents

a. Officer, warrant officer, and enlisted applicants for programs administered by this regulation will be required to sign documents which specify the eligibility criteria and the term of service for the desired entitlement or incentive. Furthermore, the document will contain an acknowledgment that the applicant has been advised of, and understands, the benefits of the program and the conditions which can cause termination and recoupment, if applicable. These documents must be authenticated by a proper witnessing official and will include the preparation date.

b. Each entitlement or incentive program in this regulation specifies the document(s) required for program eligibility.

c. Distribution of these documents or forms will be per the instructions contained on the forms or as otherwise specified in the appropriate text.

1-12. Processing instructions

a. Enlistment, reenlistment, or extension processing for enlisted applicants will be as prescribed by NGR 600-200 for ARNGUS personnel, and AR 601-210 or AR 140-111 for USAR personnel.

b. In addition, the appropriate incentive addendum must be completed and a copy made a permanent part of each enlistment, reenlistment, extension, or affiliation packet. Do this prior to distribution per the regulatory requirements.

1-13. Incentive payments

a. See AR 37-104-10 regarding payments for incentives.

b. All incentive payments are subject to Federal and State tax. However, payments made directly to financial institutions (SLRP and HPLRP) do not have amounts withheld for tax. Soldiers receiving SLRP or HPLRP incentives should consider additional withholding from other income to compensate for the absence of tax withholding.

c. *(Rescinded.)*

1-14. Continued incentive entitlement

a. *(Rescinded.)*

b. *(Rescinded.)*

c. *(Rescinded.)*

d. *(Rescinded.)*

e. *(Rescinded.)*

f. A soldier may be eligible for entitlement under the Montgomery GI Bill with continued entitlement to a SRIP incentive. An exception to this policy is described in paragraph 5.1-6h.

g. A SRIP participant who enters on a tour of duty in an AGR status under title 10 or title 32, U.S. Code, will not be suspended or terminated from the incentive program. This is provided the soldier remains attached or assigned to a bonus unit or continues to perform duty in a bonus skill. The soldier must remain otherwise eligible and entry on AGR status must have occurred after the soldier contracted for the incentive.

1-14.1. Status of incentives and entitlements on unit inactivation or redesignation of the Selected Reserve during the period 1 October 1991 to 30 September 1999

a. *Purpose.* This paragraph provides guidelines for the disposition of incentives or entitlements paid or pending payment to Selected Reserve unit soldiers. These guidelines are applicable when a soldier is voluntarily or involuntarily transferred or reassigned within, or between, troop program units of the Army National Guard of the United States (ARNGUS) and the U.S. Army Reserve (USAR), or transferred or reassigned to the IRR, as a direct result of unit inactivation, reduction of overstrength, reduction in force, or relocation of a Selected Reserve unit during the period 1 October 1991 to 30 September 1999.

b. *Relocation.* The relocation of a unit as addressed herein refers to the relocation of a soldier's unit of assignment to a site that is beyond reasonable commuting distance as defined in the consolidated glossary.

c. *Command responsibility.* Successful implementation and use of the procedures described herein is dependent on command coordination and responsibility.

(1) Incentives are used to induce individuals to contract for service in a specified military occupational specialty (MOS), or area of concentration (AOC), or troop program unit of the Selected Reserve. Entitlements are used to foster retention in the Selected Reserve.

(2) When a unit is scheduled for inactivation, reduction in overstrength, reduction in force, or relocation, the command is responsible for retaining incentive or entitlement recipients in the Selected Reserve, if possible, in keeping with the terms of the soldiers contracts. Where feasible, soldiers should be reassigned or transferred to positions which can use their MOS, or AOC.

(3) The affected commands should ensure that reassignment or transfer of these soldiers to the Individual Ready Reserve (IRR) occurs only when there are no Selected Reserve units (ARNGUS/USAR) within the geographical parameters of the soldiers' residences to which they can be assigned.

d. *Status.* The status or disposition of an incentive or entitlement that has been paid or is pending payment is predicated on the following:

(1) *Incentives.* Except for the USAR prior service enlistment bonus (para 2.1-3.1a) and the SLRP (para 5.1-5.1a), termination/recoupment of an incentive will not be initiated and a soldier may continue to receive full incentive payments if otherwise eligible when, only as a direct result of a unit inactivation, reduction in overstrength, reduction in force, or unit relocation, the soldier is transferred or reassigned to:

(a) Another unit of the Selected Reserve (ARNGUS/USAR). Assignment will be in the bonused MOS or AOC, or to a bonused unit, where possible.

(b) Another unit of the Selected Reserve (ARNGUS/USAR) outside reasonable commuting distance, voluntarily. Assignment in a bonused MOS or AOC, or to a bonused unit is preferred, but not necessary, Provided that there are no assignments available in the soldier's bonused MOS or AOC, or type unit within a reasonable commuting distance.

(2) *Montgomery GI Bill for Selected Reserve (chap 8)*. See paragraph 8–10b(5).

(3) *Montgomery GI Bill 2x4 Program (chap 9)*. See paragraph 9–5c(5).

e. Transfer between Reserve Components of the Army. Transfer between Reserve Components of the Army should be the priority and used in lieu of reassignment to the IRR.

(1) As specified in *c* above, every effort should be made to retain soldiers who have contracted for an incentive or an entitlement in the Selected Reserve on unit inactivation, reduction of overstrength, reduction in force, or relocation of a Selected Reserve unit. To this end, reassignment to other units within the same Reserve of the Army component should have priority. However, as a second priority, commanders must also consider transfers between Reserve Components of the Army in lieu of reassignments or transfers to the IRR.

(2) The term transfer as used in this paragraph refers to the personnel actions necessary to effect the change in strength accountability between the ARNGUS and USAR. Enlisted soldiers require discharge and enlistment actions, while officers require appointment and Federal recognition actions.

(3) Where a Selected Reserve unit (ARNGUS/USAR) is being inactivated or relocated, or the soldier is being removed from the unit because of a reduction in force or reduction of overstrength, and the soldier cannot be reassigned or utilized in another unit of the same component—

(a) The USAR soldier will be offered an opportunity to transfer to an ARNGUS unit if otherwise eligible and approved by the gaining ARNGUS command, prior to reassignment to the IRR.

(b) The ARNGUS soldier will be offered an opportunity to transfer to a USAR troop program unit if otherwise eligible and approved by the gaining USAR command, prior to discharge from the ARNGUS and transfer to the IRR.

f. Termination. Generally, a soldier's eligibility for bonus or loan repayments based on Selected Reserve service will terminate on release from the Selected Reserve and transfer or reassignment to the IRR. Recoupment is not prescribed if the transfer or reassignment to the IRR is a direct result of unit inactivation, reduction in overstrength, reduction in force, or unit relocation.

g. Recoupment. Termination and recoupment of bonus payments under the provisions of paragraphs 2–8a(5), 2.1–5d, 4–9a(5), and 5–6c(6), is required if a soldier—

(1) Fails or refuses to comply with an order which reassigns the soldier to a Selected Reserve unit which is within a reasonable commuting distance (or, if outside reasonable commuting distance, is located at or in close proximity to the location of the unit with which the soldier had been affiliated) and the reassignment is a direct result of unit inactivation, unit relocation, reduction in force, or a reduction in overstrength.

(2) Declines Reserve Component reassignment/transfer when available and offered, and the gaining ARNGUS or USAR unit is within a reasonable commuting distance of the soldier's residence or, if outside reasonable commuting distance, is located at or in close proximity to the location of the unit with which the soldier had been affiliated. The transfer must have been offered as direct result of unit inactivation, unit relocation, reduction in force, or a reduction in overstrength, and there were no units of the same component to which the soldier could be reassigned.

1–15. Suspension of SRIP incentives

a. Recipients of a SRIP incentive will be suspended from the incentive program during authorized periods of nonavailability due to (1) through (3) below. Incentive pay is NOT authorized for such periods of nonavailability.

(1) Transfer to the IRR or Standby Reserve per AR 135–91, chapter 5 (e.g., missionary obligation), or transfer to the ING per NGR 614–1.

(2) Participation in other Department of Defense (DOD) approved programs.

(3) Approved transfer to the ING/IRR for cogent personal reasons.

b. Suspension under *a*(1) and *a*(2) above will be for a maximum period of 3 years. Suspension under *a*(3) above is for up to 1 year. Nonavailability in excess of the maximum period will be cause for ending incentive entitlement.

c. The suspension provision in *a* above is not applicable to recipients of the affiliation bonus since these personnel may not extend their statutory military service obligation (MSO).

d. Except for suspension of favorable personnel actions based on failure to maintain body fat standards or Army Physical Fitness (APFT) failure, soldiers who have a suspension of favorable personnel actions initiated per AR 600–8–2 will not be processed for an initial or anniversary payment. Bonus payment(s) will be processed effective on the date the suspension is lifted for those soldiers who have continued eligibility.

e. Soldiers who are relocated or reassigned and who change MOS, but remain eligible for the bonus, may not receive a payment before qualifying in the new MOS. These soldiers are required to become MOS qualified in the new MOS within 12 months by on-the-job training, or within 24 months if service school attendance is required.

1–16. Reinstatement of SRIP incentives

a. Reinstatement in the SRIP and resumption of subsequent incentive payments following a period of authorized nonavailability is not guaranteed. Soldiers who complete a period of nonavailability and request reinstatement of eligibility for the SRIP and resumption of subsequent payments must—

(1) Complete the period of authorized nonavailability within the required time frame established in paragraph 1–15b.

(1.1) Rejoin an existing vacancy in the Selected Reserve authorized the soldier's grade and MOS in a bonus authorized unit, or a bonus authorized MOS.

(2) Extend their enlistment or reenlistment agreement within 30 days in order to serve out the full incentive contract period in the Selected Reserve. This is provided unit reenlistment officials have access to the soldier's military personnel records jacket (MPRJ) and are able to verify the soldier's eligibility to extend.

b. A soldier who does not comply with all of the requirements in *a* above will be subject to termination of SRIP with recoupment action required.

c. A soldier who complies with all of the requirements listed in *a* above will have entitlement to payments resume on the adjusted anniversary date of satisfactory creditable Selected Reserve service.

d. *(Rescinded.)*

e. *(Rescinded.)*

1-17. Termination

Soldiers will have their incentive eligibility and entitlement stopped when any of the termination reasons apply as listed within the applicable chapters of this regulation. Once being declared ineligible, termination of SRIP will not affect a soldier's responsibility to serve his or her current statutory or contractual service commitment.

1-18. Recoupment

a. The conditions under which recoupment action is warranted and the computation for the amount of such recoupments are outlined for each incentive within appropriate chapters of this regulation.

b. The Office of the Comptroller of the Army will issue specific collection procedures for the recoupment of incentive payments.

c. Commanders are responsible for initiating recoupment procedures whenever a soldier's entitlement to an incentive is terminated and recoupment is indicated in this regulation.

d. Any refund made by a soldier under recoupment procedures will not affect that soldier's period of obligation to serve in the ARNGUS or the USAR for the balance of the term of service entered into contractually or by statutory requirements.

e. *(Rescinded.)*

1-19. Reporting requirements

a. Reporting requirements for subordinate elements of the ARNG and USAR will be governed by proper component directives.

b. Soldiers participating in or terminated from an incentive program governed by this regulation will be reported. Use the appropriate incentive participant codes listed in figure 1-1.

I. Incentive Type

A—Enlisted with cash Enlistment Bonus
B—Enlisted with Educational Assistance
C—Reenlisted/extended with bonus for 3 years
D—Reenlisted/extended with bonus for 6 years
N—Previous incentive recipient (contract completed) present term without incentive
Q—Not receiving incentive (no previous incentive)
R—Affiliated with bonus for 18 months or less
S—Affiliated with bonus for more than 18 months
V—Converted from Educational Assistance to Enlistment Bonus
W—Converted from Enlistment Bonus to Educational Assistance

II. Incentive Termination Reason

E—Terminated: Unsatisfactory participation
F—Terminated: Transferred to another Reserve Component
G—Terminated: Transferred to active enlisted force
H—Terminated: Transferred to the officer corps
I—Terminated: Unauthorized change in MOS
J—Terminated: Transferred to nonincentive qualified unit within locale
K—Terminated: Accepted civilian position where Reserve membership is a condition of employment
L—Terminated: Assigned to AD or ADT in excess of 90 days in support of the Reserve program
M—Terminated: Other

Blank () — Blank — Unknown

III. Loan Repayment

T—Loan Repayment under part B or E of the Higher Education Act of 1965

Figure 1-1. Incentive participant codes

1–20. Claims requiring ABCMR determination

a. Requests or claims involving the correction or amendment of dates or terms of service of enlistment, reenlistment, or extension agreements, will be submitted on DD Form 149 (Application for Correction of Military Record) per AR 15–185, to the Army Board for Correction of Military Records (ABCMR). This board makes a determination as provided under law (10 USC 1552).

b. (*Rescinded.*)

1–21. SRIP and SLRP eligibility under the USAR Drill Sergeant Program

A soldier assigned to a drill sergeant (special qualification identifier (SQI) “X”) duty position in a USAR training brigade or division may be eligible for a SRIP prior service enlistment (chap 2.1), reenlistment (chap 4), or affiliation (chap 5) bonus , or the student loan repayment program (SLRP) (chap 5.1), under the following conditions:

a. Eligibility. A soldier is—

(1) SQI X qualified and assigned to a drill sergeant duty position. If otherwise eligible per paragraphs 2.1–3, 4–3 , 4–4, 5–3, or 5.1–3, the soldier may enlist, reenlist, or affiliate for the bonus specified in paragraphs 2.1–2, 4–2, or 5–2, or the SLRP specified in paragraph 5.1–2. A match of the soldier’s MOS and the duty position MOS is not required.

(2) Not SQI X qualified and assigned to a drill sergeant duty position.

(a) The duty position MOS or unit is authorized for a bonus and the soldier is qualified in the MOS. If eligible per

paragraphs 2.1–3, 4–3 and 4–4, 5–3, or 5.1–3, the soldier may enlist, reenlist, or affiliate for the bonus specified in paragraphs 2.1–2, 4–2, or 5–2, or the SLRP specified in paragraph 5.1–2. A match of the soldier’s MOS and the duty position MOS is mandatory for the prior service enlistment bonus (chap 2.1). MOS match is not mandatory where a soldier is contracting for service in a bonus authorized unit for the reenlistment bonus (chap 4, an affiliation bonus (chap 5), or SLRP (chap 5.1).

(b) The unit or duty position MOS is not authorized for a bonus or the soldier’s MOS does not match the duty position. The soldier is not eligible for the prior service enlistment bonus (chap 2.1), but if otherwise eligible per paragraphs 4–3 and 4–4, 5–3, or 5.1–3, the soldier may reenlist, or affiliate for the bonus specified in paragraphs 4–2 or 5–2, or the SLRP specified in paragraph 5.1–2. The soldier must agree to successfully complete Drill Sergeant School and qualify in SQI X within 24 months of assignment to the drill sergeant duty position. Entitlement to a bonus or the SLRP is gained on execution of the enlistment, reenlistment, or affiliation documents and is not suspended pending SQI X qualification.

(3) *(Rescinded.)*

(4) *(Rescinded.)*

(a) *(Rescinded.)*

(b) *(Rescinded.)*

b. Continuing SRIP or SLRP entitlement on reassignment to a drill sergeant duty position. A soldier, SPC/CPL or above, currently entitled to a SRIP or SLRP incentive, will retain SRIP or SLRP entitlement on reassignment to a drill sergeant duty position. This policy is contingent on the following requirements. A soldier is—

(1) SQI X qualified and reassigned to a drill sergeant duty position. Except for the prior service enlistment bonus (chap 2.1), a match of the soldier’s MOS and the duty position is not required and SRIP or SLRP entitlement continues. For the prior service enlistment bonus (chap 2.1), the soldier must have been awarded SQI X and served on active duty as a drill sergeant.

(2) Not SQI X qualified and is reassigned to a drill sergeant duty position, and

(a) The duty position MOS is authorized for a bonus and the soldier is qualified in the MOS. A match of the soldier’s MOS and the duty position MOS is required and SRIP or SLRP entitlement continues or

(b) The unit is a bonus authorized unit and the duty position is not authorized for a bonus or the soldier’s MOS does not match the duty position. Prior service enlistment bonus entitlement is terminated, however, reenlistment, and affiliation bonus or SLRP entitlement may continue provided the soldier agrees to successfully complete Drill Sergeant School and qualify in SQI X within 24 months of assignment to the drill sergeant duty position. SRIP reenlistment and affiliation bonus or SLRP entitlement is continued and is not suspended pending SQI X qualification.

(c) The unit is not a bonus authorized unit and the duty position is not authorized for a bonus, or the soldier’s MOS does not match the duty position. Prior service enlistment bonus entitlement is terminated, however, reenlistment and affiliation bonus or SLRP entitlement may continue provided the soldier agrees to successfully complete Drill Sergeant School and qualify in SQI X within 24 months of assignment to the drill sergeant duty position. Reenlistment and affiliation bonus or SLRP entitlement is continued and is not suspended pending SQI X qualification.

c. Termination and recoupment.

(1) Termination and recoupment rules specified for SRIP and SLRP incentives apply to those soldiers assigned or reassigned to drill sergeant duty positions per this paragraph.

(2) Soldiers assigned to drill sergeant duty positions per paragraphs *a(2)(a)*, or *b(2)(a)* who do not become qualified in SQI X within the specified period of time, or fail to complete Drill Sergeant School, unless removed for cause, must be reassigned to another bonus authorized duty position, or a duty position in a bonus authorized unit. The provisions of paragraph 1–15e apply. If such positions are not available or if the soldier declines reassignment, paragraph (1) above applies.

(3) Soldiers assigned to drill sergeant duty positions per paragraphs *a(2)(b)* or *b(2)(b)* who do not become qualified in SQI X within the specified period of time, or who fail to complete Drill Sergeant School, will be subject to bonus termination and recoupment unless reassigned to another bonus authorized duty position or authorized bonus unit. The provisions of paragraph 1–15e apply. If the command reassigns the soldier to the IRR as a result of failure to become SQI X qualified, paragraph (1) applies.

Chapter 2

Selected Reserve Incentive Program—Nonprior Service Enlistment Bonus

2–1. General

This chapter provides policy and guidance for the administration of the SRIP Enlistment Bonus. Enlistment for this incentive is not authorized after 30 Sep 96.

2-2. Nonprior service enlistment bonus

- a. This incentive offers a cash bonus to an eligible soldier who enlists in the Selected Reserve for the following:
- (1) Prior to 1 Apr 93, \$2,000 for enlistment in a bonus skill authorized by HQDA.
 - (1.1) On or after 1 Apr 93, \$1,500 for enlistment in a bonus skill authorized by HQDA.
 - (2) \$1,500 for enlistment in a bonus unit of the Selected Reserve authorized by HQDA.
 - (3) On or after 1 Jul 92, \$2,000 for enlistment in a high-priority unit as determined by the HQDA, Deputy Chief of Staff for Operations.
 - (4) \$2,000 for enlistment in a bonus skill authorized by HQDA that is in a bonus unit also authorized by HQDA.
 - (5) \$5,000 for enlistment through the Army Civilian Acquired Skills Program (ACASP) (AR 601-210, chap 7, or NGR 600-200, chap 3) in a military occupational specialty (MOS) authorized by HQDA for the bonus.
- b. *(Rescinded.)*
- c. Except for the \$5,000 enlistment bonus (a(5) above), the enlistment bonus is payable on the following schedule:
- (1) The initial payment consists of one-half of the total bonus amount for which soldier is qualified. It is paid when the soldier—
 - (a) Has completed Initial Active Duty for Training (IADT).
 - (b) Is MOS qualified or received sufficient training to be deployable.
 - (c) Qualifies as a high school diploma graduate as defined in the consolidated glossary under Educational Levels, paragrapha.
 - (2) The remainder of the authorized bonus amount consists of two equal increments of one-fourth of the total bonus amount each. Payments are made on satisfactory completion of the second and the fourth year of the enlistment term of service. Entitlement accrues on the anniversary date of the respective contract year.
 - c.1. The \$5,000 enlistment bonus (a(5) above) is payable on the following schedule:
 - (1) For enlistment's in the ARNGUS—
 - (a) The initial payment consists of (20 percent) \$1,000 payable when the soldier qualifies as a secondary school graduate as defined in paragraph 1-7.1, and is awarded the ACASP bonus authorized MOS.
 - (b) An amount of (30 percent) \$1,500 is payable on the third anniversary date of the soldier's enlistment.
 - (c) The remainder of the authorized bonus amount (50 percent) \$2,500 is payable on the fifth anniversary date of the soldier's enlistment.
 - (2) For enlistment's in the USAR—
 - (a) The initial payment consists of (50 percent) \$2,500 payable when the soldier qualifies as a secondary school graduate as defined in paragraph 1-7.1, and is awarded the ACASP bonus authorized MOS.
 - (b) An amount of (20 percent) \$1,000 is payable on the third anniversary date of the soldier's enlistment.
 - (c) The remainder of the authorized bonus amount (30 percent) \$1,500 is payable on the fifth anniversary date of the soldier's enlistment.
 - (3) For transfer between the Reserve Components of the Army. Where a soldier enlisted for the \$5,000 enlistment bonus with payments as scheduled per (1) or (2) above, transfers from the ARNGUS to the USAR or from the USAR to the ARNGUS, the soldier will continue under the payment schedule for which initially enlisted. This is provided transfer with continuing entitlement to subsequent bonus payments is authorized per paragraph 2-5.1.

2-3. Eligibility

A cash bonus as prescribed by paragraph 2-2, is offered, subject to the entitlement conditions of paragraph 2-4, to any person meeting all of the following requirements:

- a. *(Rescinded.)*
- b. Meets the eligibility criteria for enlistment as a nonprior service (NPS) applicant prescribed by governing ARNG or USAR regulations. This does not include enlistment's as glossary nonprior service (GNPS). (See definition of NPS in the consolidated glossary, definition of terms, and the definition of "GNPS" in AR 601-210 and NGR 600-200.)
- c. Enlists in the ARNGUS or USAR for a term of service of 8 years, of which 6 years must be served in the unit of the Selected Reserve (8x0 or 6x2). The soldier may serve the remaining portion of the MSO in the IRR or ING.
- d. Enlists for assignment to a position vacancy in a Selected Reserve bonus unit and/or bonus MOS as designated by HQDA. The position vacancy must exist by the time the enlistee completes IADT.
- e. Qualifies as a secondary school graduate (para 1-7.1).
- f. Is classified in Mental Category I, II, or III (Armed Forces Qualification Test (AFQT) test score of 31 or higher).
- g. Is not enlisting to qualify for a permanent civilian position where membership in the Selected Reserve is a condition of civilian employment.
- h. Is not enlisting for voluntary assignment to full-time AD or ADT beyond 90 days in support of the Reserve program.
- i. Completes DA Form 5261-R (Selected Reserve Incentive Program—Enlistment Bonus Addendum) as part of the

enlistment agreement. (A reproduction master copy of this form is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.)

2-4. Entitlement

a. Soldiers will not receive any enlistment bonus payment, initial or subsequent, until he or she—

- (1) Has completed IADT.
- (2) Is MOS qualified or received sufficient training to be deployed.
- (3) Has been awarded a high school diploma or otherwise qualifies as a high school diploma graduate and shows proof of such status within the time frame established in paragraph 1-7.1b.

b. Entitlement to the cash enlistment bonus may be continued for soldiers who later enter on AD or FTNGD in an AGR status. This is provided they remain otherwise eligible. This policy applies to soldiers enlisting under the current SRIP provisions as well as those soldiers who enlisted under the SRIP authorized for earlier FYs.

2-5. Conversion option

(Rescinded).

2-5.1. Continuing entitlement on transfer between Reserve Components of the Army

Entitlement to receive subsequent bonus payments on transfer between the Reserve Components of the Army (ARNGUS and USAR) is prescribed by this paragraph.

a. On transfer from a USAR Selected Reserve TPU to the ARNGUS.

(1) A soldier enlisted in the USAR for a bonus specified in paragraph 2-2a(1) through (4) will terminate entitlement to subsequent bonus payments, unless the transfer is based on the provisions of paragraph 1-14.1, or otherwise authorized by the Chief, National Guard Bureau.

(2) A soldier enlisted in the USAR for a bonus specified in paragraph 2-2a(5), who remains in the bonused MOS on transfer to the ARNGUS, will continue to receive subsequent bonus payments under the payment schedule shown in paragraph 2-2c.1(2).

b. On transfer from the ARNGUS to a USAR Selected Reserve TPU.

(1) An ARNGUS soldier entitled to a bonus specified in paragraph 2-2a(1) through (4) will continue to receive subsequent bonus payments. This is provided the soldier remains eligible and termination (para 2-6) is not required, or the transfer is based on the provisions of paragraph 1-14.1 in circumstances not requiring termination.

(2) A soldier enlisted in the ARNGUS for a bonus specified in paragraph 2-2a(5), who is otherwise eligible and remains in the bonused MOS on transfer to a USAR Selected Reserve TPU, will continue to receive subsequent bonus payments under the payment schedule shown in paragraph 2-2c.1(1).

c. Eligibility upon transfer. A soldier who is not eligible for the bonus under this chapter as a member of the losing Reserve Component of the Army does not gain bonus eligibility under this chapter on becoming a member of the gaining Reserve Component of the Army. The transfer process does not represent enlistment as a nonprior service applicant required for bonus eligibility under this chapter.

2-6. Termination

Enlistment bonus entitlement will stop if the soldier—

a. Becomes an unsatisfactory participant under AR 135-91. The termination date entered into personnel data reporting systems must be the date the soldier attained his or her 9th unexcused absence (AR 135-91, para 4-11a), or the date the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135-91, para 4-13).

b. Moves to a nonbonused unit or MOS or is reclassified in an MOS other than that for which contracted. Bonus entitlement will not terminate if the soldier is moved to another Selected Reserve unit to MOS—

- (1) For normal career progression (AR 611-201); or
- (2) When retention of bonus entitlement is authorized per paragraph 1-14.1; or
- (3) When the move has been approved by the Chief, National Guard Bureau or Chief, Army Reserve.

c. *(Rescinded.)*

d. Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment.

e. Fails to extend the contracted term of service for a period of nonavailability.

f. Exceeds the maximum period authorized for suspension (para 1-15).

g. Becomes a participant in the Senior Reserve Officers' Training Corps/Simultaneous Membership Program (ROTC/SMP) on enrollment in the ROTC advanced course, or becomes an assigned member of control group (ROTC).

h. Separates from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason, except when separated for an authorized period of nonavailability per paragraph 1-15, or entry on AD or FTNGD in an AGR status. Separated includes, but is not limited to—

- (1) Discharge, or transfer to the Individual Ready Reserve, Standby Reserve, or Retired Reserve.

(2) Enlistment or appointment in the Regular Army or in a Regular or Reserve Component of another U.S. armed force.

(3) Voluntary entry or order to extended active duty (EAD) (see glossary) in the Active Army (accessed to the strength accountability of the active military service of the Army).

(4) Appointment as a commissioned officer or warrant officer.

i. Completes a total of 6 years service in the Selected Reserve.

j. Fails to become MOS qualified within time limit.

k. Attending high school at time of enlistment and does not become a secondary school graduate within the required time frame (para 1–7.1b).

2–7. Personnel in AGR status

(Rescinded.)

2–8. Recoupment conditions

a. Recoupment of bonus payments will be started by the unit commander when entitlement to such incentive is terminated based on any of the following reasons:

(1) Unsatisfactory participation (para 2–6a).

(2) Moves to a nonbonused unit or MOS or is reclassified in an MOS other than that for which contracted. Recoupment is not authorized if the soldier is moved to another unit or MOS—

(a) For normal career progression (AR 611–201); or

(b) When retention of bonus entitlement is authorized per paragraph 1–14.1; or

(c) When the move has been approved by the Chief, National Guard Bureau or Chief, Army Reserve.

(3) **(Rescinded.)**

(4) Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment (see para 2–6d) before 6 months of the enlistment term of service has been served.

(5) Separation from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason unless due to—

(a) Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force per paragraph 1–14.1

(b) Acceptance of immediate appointment as an officer in the Ready Reserve after 1 year or more of the enlistment term has been satisfactorily served.

(c) Becoming an assigned member of Control Group (ROTC).

(d) Death, injury, illness, or other impairment not the result of own misconduct.

(e) Involuntary order to EAD in the Active Army (accessed to the strength accountability of the active military service of the Army).

(f) Entry on an authorized period of nonavailability per paragraph 1–15.

(g) Entry on AD or FTNGD in an AGR status.

b. **(Rescinded.)**

2–9. Settlement of accounts

Enlistment bonus recoupment or balance due amounts will be calculated as follows:

a. Multiply the number of months served satisfactorily during the term for which the incentive was authorized by the proportionate monthly dollar amount. (The proportionate monthly dollar amount will be determined by dividing the total authorized enlistment bonus amount by 72 months.)

b. Subtract that amount from the total bonus paid to the soldier to date (initial plus any later payments).

c. If the calculation indicates overpayment to the soldier, that amount will be recouped.

d. If the calculation indicates the soldier has earned more than he or she has been paid to date on the same pro-rata basis, the difference will be paid in a final installment.

Chapter 2.1

Selected Reserve Incentive Program—USAR Prior Service Enlistment Bonus

2.1–1. General

This chapter provides policy and guidance for the administration of the SRIP USAR Prior Service Enlistment Bonus. Enlistment for this incentive is not authorized after 30 Sep 1996.

2.1–2. Prior service enlistment bonus

a. This incentive offers a cash bonus to eligible persons with prior military service who enlist in the USAR and contract to serve in a troop program unit (TPU) of the Selected Reserve in a designated MOS announced by HQDA, or as a drill sergeant. The incentive offers—

- (1) \$2,500 for an enlistment to serve 3 years in a TPU; or
- (2) \$5,000 for an enlistment to serve 6 years in a TPU.

b. The bonus is payable on the following schedule:

(1) The initial payment consists of \$1,250 for an enlistment of 3 years and \$2,500 for an enlistment of 6 years. The initial payment is made when the soldier—

(*a*) (**Rescinded.**)

(*b*) Fills a TPU position vacancy for which he or she is MOS qualified per paragraph 2–1.3k and the MOS has been announced by HQDA for award of the bonus.

(*c*) Fills a drill sergeant position vacancy for which he or she is qualified (SQI X) per paragraph 2.1–3k. (See para 1–21.)

(2) The remainder of the authorized bonus will be paid in the amount of \$416.66 upon the completion of each year of service for the term of the original contract. Entitlement accrues on the anniversary date of the respective contract year.

2.1–3. Eligibility

A cash bonus as prescribed by paragraph 2.1–2*a* is offered to any person who meets all of the following requirements:

a. Received an honorable discharge at the conclusion of his or her last period of military service.

b. If last discharged from the ARNGUS or USAR, the applicant has been out of the military service for at least 12 months.

c. Has completed his or her statutory military service obligation.

d. Has less than 10 years of total military service.

e. Is not being released from active duty or full-time National Guard duty (FTNGD) for the purpose of enlistment in the USAR.

f. Is not enlisting to qualify for a permanent civilian position where membership in the Selected Reserve is a condition of civilian employment.

g. Has not previously been paid a bonus for enlistment, reenlistment, or extension of an enlistment in any Reserve Component of the Armed Forces.

h. Meets the eligibility criteria for enlistment in the USAR as a prior service (PS) applicant as prescribed by AR 601–210.

i. Enlists after 1 Mar 1991 for a period of 3 years (\$2,500 bonus) or 6 years (\$5,000 bonus).

j. Completes DA Form 5261–5–R (Selected Reserve Incentive Program—Prior Service Enlistment Bonus Addendum) as part of the enlistment agreement. (A reproduction master copy of this form is at the end of this volume and will be locally reproduced on 8 1/2– by 11–inch paper.)

k. Upon enlistment, will qualify for the USAR TPU position vacancy to which assigned by one of the following means:

(1) Possesses a bonus MOS announced by HQDA which is the same as that required by the TPU position vacancy. The soldier must have successfully served in the MOS and attained a level of qualification commensurate with the soldier's grade and years of service while serving on active duty.

(2) (**Rescinded.**)

(3) (**Rescinded.**)

(4) Possesses SQI X and assigned to a TPU drill sergeant duty position. The soldier must have been awarded SQI X and successfully served on active duty as a drill sergeant.

2.1–3.1. Continuing entitlement on transfer between Reserve Components of the Army

a. Transfer from the USAR to the ARNGUS. The entitlement of a USAR Selected Reserve soldier to receive subsequent bonus payments under this chapter will terminate on enlistment in the ARNGUS even if the transfer is based on the provisions of paragraph 1–14.1 However, recoupment of the bonus is not authorized.

b. Transfer from the ARNGUS to the USAR. An ARNGUS soldier who is not eligible for a bonus under this chapter will not gain entitlement to the bonus on transfer to a USAR Selected Reserve TPU.

2.1–4. Termination

Bonus entitlement will stop if the soldier—

a. Becomes an unsatisfactory participant per AR 135–91. The termination date entered into personnel data reporting systems must be the date the soldier attained his or her ninth unexcused absence (AR 135–91, para 4–11*a*), or the date

the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135–91, para 4–13).

b. Moves to a nonbonused MOS, or is reclassified in an MOS other than that for which contracted. Bonus entitlement will not terminate if the soldier retains membership in a USAR Selected Reserve unit and is moved to another MOS—

- (1) For normal career progression (AR 611–201); or
 - (2) When retention of bonus entitlement is authorized per paragraph 1–14.1; or
 - (3) When the move has been approved by the Chief Army Reserve.
- c. Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment.
- d. Fails to extend the contracted term of service for a period of nonavailability.
- e. Exceeds the maximum period authorized for suspension (para 1–15).
- f. Becomes a participant in the Senior Reserve Officers’ Training Corps/Simultaneous Membership Program (ROTC/SMP) on enrollment in the ROTC Advanced Course, or becomes an assigned member of Control Group (ROTC).
- g. Separates from enlisted status in a Selected Reserve unit of the USAR for any reason, except when separated for an authorized period of nonavailability per paragraph 1–15, or entry on AD in an AGR status. Separation includes, but is not limited to—
- (1) Enlistment or appointment in the ARNGUS.
 - (2) Discharge, or transfer to the Individual Ready Reserve, Standby Reserve, or Retired Reserve.
 - (3) Enlistment or appointment in the Regular Army or in a Regular or Reserve Component of another U.S. armed force.
 - (4) Voluntary entry or order to extended active duty (EAD) (see glossary) in the Active Army (accessed to the strength accountability of the active military service of the Army).
 - (5) Appointment as a commissioned officer or warrant officer.
- h. Completes the initial term of service prescribed by the enlistment contract.
- i. (**Rescinded.**)
- j. SQI X is withdrawn voluntarily or for cause (para 1–21c).

2.1–5. Recoupment conditions

Recoupment of bonus payments will be started by the unit commander when entitlement to such incentive is terminated based on any of the following reasons:

- a. Unsatisfactory participation (para 2.1–4a).
 - b. Moves to a nonbonused MOS, or is reclassified in an MOS other than that for which contracted. Recoupment is not authorized if the soldier is moved to another MOS—
- (1) For normal career progression (AR 611–201); or
 - (2) When retention of bonus entitlement is authorized per paragraph 1–14.1; or
 - (3) When the move has been approved by the Chief Army Reserve.
- c. Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment (para 2.1–4b) before 6 months of the enlistment term of service has been served.
- d. Separation from enlisted status in a USAR Selected Reserve unit for any reason unless due to—
- (1) Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force per paragraph 1–14.1.
 - (2) Acceptance of an immediate appointment as an officer in the Ready Reserve after 1 year or more of the enlistment term has been satisfactorily served.
 - (3) Becoming an assigned member of Control Group (ROTC).
 - (4) Death, injury, illness, or other impairment not the result of own misconduct.
 - (5) Involuntary order to EAD in the Active Army (accessed to the strength accountability of the active military service of the Army).
 - (6) Entry on an authorized period of nonavailability per paragraph 1–15.
 - (7) Entry on AD in an AGR status.
- e. SQI X, or SQI X is withdrawn voluntarily or for cause (See para 1–21c).

2.1–6. Settlement of accounts

Bonus recoupment or balance due amounts will be calculated as follows:

- a. Multiply the number of months served satisfactorily during the term for which the incentive was authorized by the proportionate monthly dollar amount. (The proportionate monthly dollar amount will be determined by dividing the total authorized enlistment bonus by 36 or 72 months as appropriate. For example, \$2,500 divided by 36, or \$5,000 divided by 72.)

- b. Subtract the amount calculated in paragraph a from the total bonus paid to the soldier to date (initial plus any later payments).
- c. If the calculation indicates overpayment to the soldier, that amount will be recouped.
- d. If the calculation indicates the soldier has earned more than he or she has been paid to date on the same pro-rata basis, the difference will be paid in a final installment.

Chapter 3

Selected Reserve Incentive Program—Educational Assistance Program

3–1. General

(Rescinded.)

3–2. Educational assistance

(Rescinded.)

3–3. Eligibility

(Rescinded.)

3–4. Entitlement

(Rescinded.)

3–5. Conversion option

(Rescinded.)

3–6. Personnel in AGR status

(Rescinded.)

3–7. Termination

(Rescinded.)

3–8. Recoupment conditions

(Rescinded.)

3–9. Settlement of accounts

(Rescinded.)

Chapter 4

Selected Reserve Incentive Program—Reenlistment/Extension Bonus

4–1. General

For the purpose of this chapter and applicability to the SRIP Reenlistment Bonus, the term “extension” applies exclusively to ARNGUS soldiers. ARNGUS soldiers may also be processed for immediate reenlistment. USAR soldiers must qualify for the reenlistment bonus under the SRIP by executing an immediate reenlistment agreement. Extensions of USAR enlistment or reenlistment agreements will not serve to qualify a soldier for a reenlistment or extension bonus. Reenlistment for this incentive is not authorized after 30 Sep 1996.

4–2. Reenlistment or extension bonus

Eligible soldiers immediately reenlisting or extending under the SRIP, depending on their total length of service at current expiration term of service (ETS) (para 4–6), may be offered one of the following incentives:

a. A soldier with less than 6 years total military service at current ETS, who reenlists or extends for a period of 6 years within 3 months before or 24 hours after the termination of a statutory military service obligation, or within 3 months before or 24 hours after completion of a Selected Reserve contractual obligation, whichever is earlier, is entitled to a bonus of \$2,500 payable as follows:

- (1) Five hundred dollars (\$500) on the effective date of the reenlistment or extension.
- (2) The remainder of the authorized bonus is payable in six increments of \$200, \$300, \$300, \$400, \$400, and \$400 respectively. This will be on satisfactory completion of each year of the 6-year term of service of the reenlistment or extension.

b. A soldier with at least 6 to 10 (exactly) years of total military service at current ETS, who reenlists or extends within 3 months before, or 24 hours after, ETS for:

(1) 6 years is entitled to a bonus of \$2,500 payable—

(a) Five hundred dollars (\$500) on the effective date of the reenlistment or extension.

(b) The remainder in six increments of \$200, \$300, \$300, \$400, \$400, and \$400 respectively on satisfactory completion of each year of the 6-year term of service of the reenlistment or extension.

(2) Three, 4, or 5 years is entitled to a bonus of \$1,250 payable as follows:

(a) Two hundred fifty dollars (\$250) on the effective date of the reenlistment or extension.

(b) The remainder in three increments of \$200, \$400, and \$400 respectively on satisfactory completion of the first through the third years of service of the term of the reenlistment or extension.

c. (*Rescinded.*)

4-3. Eligibility

An immediate reenlistment or extension bonus as described in paragraph 4-2 may be awarded to a Selected Reserve soldier who—

a. Meets all immediate reenlistment or extension eligibility criteria of NGR 600-200 for ARNGUS soldiers or the immediate reenlistment criteria of AR 140-111 for USAR soldiers.

b. Is within 3 months before or 24 hours after ETS of current Selected Reserve contractual obligation (para 4-4).

c. Has not previously received a reenlistment or extension bonus for service in the Selected Reserve.

d. Is executing an official reenlistment or extension document (DD Form 4 Series (Enlistment/Reenlistment Document—Armed Forces of the United States) or DA Form 4836 (Oath of Extension of Enlistment or Reenlistment) as applicable). As part of the reenlistment or extension agreement, the soldier must also complete DA Form 5261-2-R (Selected Reserve Incentive Program—Reenlistment/Extension Bonus Addendum). (A reproduction master copy of this form is at the end of this regulation and will be locally reproduced on 8½- by 11-inch paper.)

e. Is reenlisting or extending for a valid position vacancy in:

(1) Designated unit or MOS authorized for award of an immediate reenlistment or extension bonus. Additionally, he or she must meet the MOS qualification (to the 3rd digit) of that position at the time of reenlistment or extension. Or, he or she must be qualified in an MOS within the normal career progression of that MOS per AR 611-201.

(2) A drill sergeant (special qualification identifier (SQI)“X”) duty position in a USAR training brigade or division. (See para 1-21.)

(3) An MOS immaterial duty position provided the unit of assignment, or the soldier’s PMOS, has been identified by HQDA (DAPE-MPA) as bonus eligible. In such cases DMOS qualification is not required.

f. Holds rank and grade with respect to the unit vacancy as listed below.

(1) As required by the vacancy.

(2) As authorized under the promotion criteria of NGR 600-200 or AR 140-158.

(3) No more than two grades lower than specified for the vacancy in the USAR.

g. Is not reenlisting or extending for a permanent civilian position where membership in the Selected Reserve is a condition of employment.

h. (*Rescinded.*)

i. Has been a satisfactory participant in the Selected Reserve for the 3 months preceding the reenlistment or extension per AR 135-91, paragraphs 3-1 and 3-2. A soldier who has accrued one or more unexcused absences, or declared an unsatisfactory participant for failure to complete AT, in the 3 months preceding reenlistment or extension is not eligible for a reenlistment bonus.

j. Is not reenlisting or extending, on or after 1 Mar 88, for entry on a tour of AGR duty, AGR tour renewal, or retention on AGR status. This includes AGR tours of duty under title 10 or title 32, U.S. Code.

4-4. USAR Reenlistment eligibility window

a. To be eligible for the reenlistment incentive when otherwise authorized and qualified, a soldier must execute an immediate reenlistment or extension agreement when within 3 months before or 24 hours after the expiration of—

(1) A Selected Reserve contractual obligation incurred by initial enlistment in the ARNGUS or USAR under the 8x0, 6x2, 4x4, 3x5, and 3x0 enlistment options per AR 601-210 or NGR 600-200.

(2) A statutory MSO incurred under 10 USC 12103(d) or 10 USC 651 on initial enlistment.

(3) A Selected Reserve contractual obligation incurred by an immediate reenlistment or an extension in the Selected Reserve under AR 140-111. USAR members normally may be processed for immediate reenlistment at any time during a current extension (AR 140-111). However, to qualify for a reenlistment incentive under this chapter, the immediate reenlistment must be accomplished when within 3 months before or 24 hours after the expiration of the current USAR extension

(4) The remaining portion of a statutory or contractual obligation of the soldier on transfer to a unit of the Selected Reserve from the IRR, ING, or the Active Army.

b. A Selected Reserve unit member who has a remaining statutory MSO may immediately be processed for reenlistment per AR 140–111 and participate in the reenlistment bonus program provided he or she—

- (1) Has satisfactorily completed the Selected Reserve contractual obligation of an enlistment agreement incurred under the 8x0, 6x2, 4x4, or 3x5 enlistment options.
- (2) Voluntarily elected to remain assigned to a unit of the Selected Reserve in lieu of transfer to the IRR or ING.
- (3) Is otherwise eligible and qualified.

4–5. Entitlement

a. Entitlement to the initial payment of an immediate reenlistment or extension bonus begins on the effective date of the reenlistment or extension.

b. Entitlement to scheduled subsequent payments is effective on the last day of each respective year of the term of the immediate reenlistment or extension served without being designated an unsatisfactory participant per AR 135–91.

c. Entitlement may be continued for soldiers who later enter on AD in an AGR status and perform on AD in a bonus unit or MOS. This policy applies to current reenlistments or extensions and those soldier who reenlisted or extended under the SRIP authorized for earlier years.

4–6. Computation of years of service

Compute the total years of service at current ETS for reenlistment bonus eligibility. Subtract the pay entry basic date (PEBD) from the ETS date (inclusive) of the current enlistment agreement (as amended by current extension if applicable). Where a soldier has a period of nonavailability, authorized under AR 135–91, chapter 5, section III, or NGR 614–1, that period spent in the ING or the IRR/Standby Reserve will be deducted from the total years of service as computed above. But this is only for the purpose of establishing reenlistment bonus eligibility under the SRIP.

4–6.1. USAR TPU reenlistment bonus control numbers

a. USAR TPU personnel will request a reenlistment bonus control number from the appropriate Army Reserve Command (ARCOM) or General Officer Command (GOCOM) headquarters prior to completion of DA Form 5261–2–R. Each ARCOM/GOCOM will maintain a reenlistment bonus control number log for that command. Information required prior to issuing a control number will include, as a minimum—

- (1) Name.
- (2) Social security number.
- (3) Unit of assignment and unit identification code (UIC).
- (4) Primary MOS and duty MOS.
- (5) Pay entry basic date (PEBD) and expiration of term of service (ETS) date.
- (6) Height and weight.
- (7) Date of reenlistment and the years of service.

b. Where it has been determined a soldier does not meet the provisions of paragraph 4–3 above, the soldier will be denied the reenlistment bonus. In addition, the soldier’s unit of assignment or primary MOS must have been identified by HQDA as bonus eligible.

c. Authority to issue control numbers may be delegated no lower than ARCOM/GOCOM level.

d. The reenlistment bonus control number will be entered on the DD Form 4, Item 8b (Remarks), on the upper right hand corner of DA Form 3540/1, DA Form 5261–2–R, and on finance documents.

4–6.2. Continuing entitlement on transfer between Reserve Components of the Army

Entitlement to receive subsequent bonus payments on transfer between the Reserve Components of the Army (ARNGUS and USAR) is prescribed by this paragraph.

a. On transfer from a USAR Selected Reserve TPU to the ARNGUS. A USAR soldier entitled to a bonus specified in paragraph 4–2 will continue to receive subsequent bonus payments. This is provided the soldier remains eligible and termination (para 4–7) is not required, or the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination.

b. On transfer from the ARNGUS to a USAR Selected Reserve TPU. An ARNGUS soldier entitled to a bonus specified in paragraph 4–2 will continue to receive subsequent bonus payments. This is provided the soldier remains eligible and termination (para 4–7) is not required, or the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination.

c. Eligibility upon transfer. A soldier who is not eligible for the bonus under this chapter as a member of the losing Reserve Component of the Army does not gain bonus eligibility under this chapter on becoming a member of the gaining Reserve Component of the Army. The transfer process does not represent the immediate reenlistment or extension procedure required for bonus eligibility under this chapter.

4–7. Termination

Reenlistment or extension bonus entitlement will stop if the soldier—

a. Becomes an unsatisfactory participant under AR 135–91. The termination date entered into personnel data reporting systems must be the date the soldier attained his or her 9th unexcused absence (AR 135–91, para 4–11a), or the date the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135–91, para 4–13).

b. Was reenlisted or extended in an MOS or drill sergeant duty, or for a Selected Reserve unit, authorized by HQDA for bonus entitlement and—

(1) Moves to a nonbonused unit or MOS, or is reclassified in an MOS other than that for which contracted. Bonus entitlement will not terminate if the soldier is moved to another Selected Reserve unit or MOS—

(a) For normal career progression (AR 611–201); or

(b) When retention of bonus entitlement is authorized per paragraph 1–14.1; or

(c) When the move has been approved by the Chief, National Guard Bureau or Chief, Army Reserve.

(2) **(Rescinded.)**

(3) was contracted for drill sergeant duty and requests and accepts assignment to a nondrill sergeant duty position in a Selected Reserve unit.

c. **(Rescinded.)**

d. Accepts a permanent civilian position where membership in the Reserve is a condition of employment.

e. Fails to extend the contracted term of service for a period of nonavailability (para 1–16).

f. Exceeds the maximum period authorized for suspension (para 1–15).

g. Becomes a participant in the Senior ROTC/SMP on enrollment in the ROTC advanced course, or becomes an assigned member of Control Group (ROTC).

h. Separates from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason, except when separated for an authorized period of nonavailability per paragraph 1–15, or entry on AD or FTNGD in an AGR status. Separation includes, but is not limited to—

(1) Discharge, or transfer to the Individual Ready Reserve, Standby Reserve, or Retired Reserve.

(2) Enlistment or appointment in the Regular Army or in a Regular or Reserve Component of another U.S. armed force.

(3) Voluntary entry or order to extended active duty (EAD) (see glossary) in the Active Army (accessed to the strength accountability of the active military service of the Army).

(4) Appointment as a commissioned officer or warrant officer.

i. Completes the term of service for which immediately reenlisted or extended under the incentive program.

4–8. Personnel in AGR status

(Rescinded)

4–8.1. Soldiers serving on AGR status

The following policy applies to soldiers entering or serving on AGR tours of duty under title 10 and title 32, U.S. Code.

a. A soldier entitled to anniversary payments under the SRIP reenlistment bonus incentive who enters or is serving on a tour of duty in an AGR status will not be suspended or terminated from the incentive. This is provided the soldier remains otherwise qualified and is attached or assigned to a bonus unit or continues to perform AGR duty in a bonus skill.

b. As of 1 Mar 88, soldiers serving on AGR status are not eligible for the SRIP reenlistment bonus if the reenlistment or extension is for the purpose of entry or retention in an AGR status.

c. A soldier within 3 months of ETS on release from AGR status, if otherwise eligible (para 4–3), may reenlist or extend for the SRIP reenlistment bonus. This is with a concurrent assignment to a bonus unit or a bonus skill in a unit. The previous 3 months of AGR service will satisfy the requirement of paragraph 4–3i.

4–9. Recoupment conditions

a. Recoupment of immediate reenlistment or extension bonus payments will be started by the unit commander when entitlement to such incentive is terminated based on any of the following conditions:

(1) Unsatisfactory participation (para 4–7a).

(2) Moves to a nonbonused unit or MOS or is reclassified in an MOS other than that for which contracted. Recoupment is not authorized when the soldier is moved to another Selected Reserve unit or MOS—

(a) For normal career progression (AR 611–201); or

(b) Because the soldier's current unit is reorganized, relocated, redesignated, inactivated, or converted (para 1–14.1); or

(c) When the move has been approved by the Chief, National Guard Bureau or Chief, Army Reserve.

(3) **(Rescinded.)**

- (4) Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment (para 4-7d) before 6 months of the enlistment term of service has been served.
- (5) Separation from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason unless due to—
 - (a) Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force per paragraph 1-14.1
 - (b) Acceptance of immediate appointment as an officer in the Ready Reserve after 1 year or more of the reenlistment or extension term of service has been satisfactorily served.
 - (c) Becoming an assigned member of Control Group (ROTC).
 - (d) Death, injury, illness, or other impairment not the result of own misconduct.
 - (e) Involuntary order to EAD in the Active Army (accessed to the strength accountability of the active military service of the Army).
 - (f) Entry on an authorized period of nonavailability per paragraph 1-15.
 - (g) Entry on AD or FTNGD in an AGR status.
- b. (*Rescinded.*)

4-10. Settlement of accounts

Calculate reenlistment or extension bonus recoupment balance due amounts as follows:

- a. Multiply the number of months served satisfactorily during the reenlistment or extension term for which the incentive was authorized by \$34.72.
- b. Subtract the answer of a above from the total bonus paid to the soldier to date (initial plus any later payments).
- c. If the calculation indicates overpayment to the soldier, that amount will be recouped.
- d. If the calculation indicates that the soldier has earned more than he or she has been paid to date on the same pro-rata basis, that amount will be paid in a final installment.

Chapter 5

Selected Reserve Incentive Program—Affiliation Bonus

5-1. General

This chapter provides policy and guidance for the administration of the affiliation bonus. Affiliation for this incentive is not authorized after 30 Sep 1996.

5-2. Affiliation bonus

a. Soldiers meeting the eligibility criteria of paragraph 5-3 may be awarded an affiliation bonus. The bonus amount is based on \$50 per month for each month of the remaining statutory MSO served in affiliation with a unit of the Selected Reserve computed from the effective date of assignment to the unit. Only whole months will be counted. Bonus payments will be as follows:

(1) A soldier with 18 months or less remaining of a statutory MSO will be entitled to payment of the entire bonus amount in a lump sum. Payment will be processed on signing the DA Form 5261-3-R (Selected Reserve Incentive Program—Affiliation Bonus Addendum) and concurrent assignment to a unit of the ARNGUS or the USAR. Entitlement is computed from the effective date of assignment to the unit. (A reproduction master copy of DA Form 5261-3-R is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.)

(2) A soldier with more than 18 months remaining on a statutory MSO will be entitled to payment of one-half the total calculated affiliation bonus amount. Processing for payment will begin upon signing the Selected Reserve affiliation bonus agreement and assignment to a Selected Reserve unit. Entitlement is computed from the effective date of assignment to the unit. The remaining half is payable on the sixth anniversary of the date on which the soldier incurred the MSO on initial entry into the Armed Forces by enlistment in a Regular or Reserve component. For soldiers who enlisted through the Delayed Entry Program (DEP) on or after 1 June 1984, the remaining half of the affiliation bonus payment will be made on the sixth anniversary of the date of order to active duty.

b. A soldier incurs a statutory military service obligation (MSO) under 10 USC 651 when he or she first becomes a member of a U.S. armed force. The anniversary dates of the MSO are derived from the date the soldier first enlisted, or was appointed or inducted, in a Regular or Reserve Component of a U.S. armed force. For example, the date a soldier with no previous military service enlisted in a delayed entry program (DEP) of a U.S. armed force established his or her MSO date. Normally, the MSO will terminate 8 years from the date of enlistment in the DEP (AR 135-91).

c. A soldier who meets the following criteria may be contracted for an affiliation bonus (See para 5-4b). The bonus is payable on release from active duty (REFRAD) and assignment to a troop program unit of the ARNGUS or USAR.

- (1) Is currently serving in the Active Army, or on active duty in an AGR status.

(2) Is within 180 days of completing the active duty term of service incurred by an enlistment or order, and the REFRAD date.

(3) Is otherwise eligible to remain on active duty by reenlisting in the component to which he or she is currently assigned (that is, Regular Army, ARNGUS, or USAR).

(4) On REFRAD, will have a remaining statutory MSO under 10 USC 651 (See *b* above).

5-3. Eligibility

a. On assignment to an ARNGUS or USAR troop program unit, an affiliation bonus may be paid to an enlisted soldier who meets all of the following criteria:

(1) Has served on active duty in the Active Army or corresponding active duty in another U.S. armed force, or has served on active duty in an Active Guard Reserve (AGR) status under 10 USC 12301(d).

(a) (**Rescinded.**)

(b) (**Rescinded.**)

(c) (**Rescinded.**)

(2) Has satisfactorily completed a term of service of one of the following:

(a) A Regular component enlistment contract in one of the U.S. armed forces.

(b) A period of obligated active duty service in an Active component of a U.S. armed force. This includes Active Army service under AR 135-210, chapter 2.

(c) A tour of active duty in an AGR status for the term specified in the AGR orders, normally 3 years. This does not include an ARNGUS tour of AGR service under title 32, U.S. Code.

(3) Has a remaining statutory MSO under 10 USC 651 (para 5-2b).

(4) Has been—

(a) Released from active duty (REFRAD) with the Active Army; or

(b) REFRAD from AGR status; or

(c) Transferred from the Individual Ready Reserve (IRR) or Standby Reserve; or

(d) Returned to active status from the Temporary Disability Retired List (TDRL); or

(e) Enlisted in the ARNGUS or USAR with concurrent assignment to a troop program unit and discharge from another U.S. armed force.

(5) When last released from active duty, must have been eligible to remain on active duty by reenlisting in the component to which he or she was assigned (that is, Regular Army, ARNGUS, USAR, and so forth)(see para 5-2c(3)).

b. In addition to meeting the eligibility requirements of *a* above, affiliation bonus applicants must also meet the following criteria:

(1) Accept assignment, affiliation, or enlistment, as applicable, to a unit of the Selected Reserve.

(2) Except for the USAR drill sergeant program and skill level 1 soldiers, possess the required grade, or be no more than 1 grade below the required grade, of the unit position vacancy to which the soldier is being assigned.

(2.0) Possess the required MOS or one within allowable substitution rules (AR 611-201).

(a) Effective 1 April 1987, the soldier must have been awarded the required MOS as either a primary (PMOS), secondary (SMOS), or additional (AMOS) MOS. On assignment to a unit for the affiliation bonus based on an SMOS or AMOS, the MOS must be awarded as the soldier's PMOS per AR 140-158 or NGR 600-200.

(b) During the period 1 January 1991 through 1 October 1994, a soldier who did not possess the required MOS and entered into an agreement to become qualified in the required MOS under a HQDA authorized MOS training program, was eligible for the affiliation bonus upon successful completion of the required training and award of the MOS.

(2.1) For the purpose of the USAR drill sergeant program only, the soldier's rank must be equal to or be no more than two grades lower than the pay grade specified for the vacancy. (See additional eligibility requirements in para 1-21.)

(2.2) Skill level 1 soldiers (PVT through SPC and CPL) are eligible for the affiliation bonus if placed into skill level 1 positions irrespective of the grade of rank, provided they are otherwise eligible.

(3) Not be affiliating to qualify for a permanent civilian position where membership in the ARNGUS or USAR is a condition of employment.

(4) Have not enlisted under the IRR Direct Enlistment Program.

(5) Enter into a written agreement to serve as an enlisted member of the Selected Reserve of the ARNGUS or the USAR for the remainder of the statutory MSO (DA Form 5261-3-R).

(6) Meet all other requirements established by the ARNGUS or USAR, as appropriate, for membership in the Selected Reserve.

5-4. Special processing

a. ARNGUS affiliation bonus applicants are required to execute an enlistment agreement (DD Form 4 series) for enlistment in the ARNGUS per NGR 600-200. A copy of the completed affiliation bonus addendum (DA Form 5261-3-R) will be attached to each copy of the DD Form 4 series before distribution.

b. Under the procedures prescribed by this regulation, USAR affiliation bonus applicants are processed at Active Army installation transition points by Reserve Component transition NCOs per AR 635–10 or reassigned from the IRR or Standby Reserve to a troop program unit per AR 140–10. A copy of the completed DA Form 5261–3–R will be attached to each copy of the DA Form 3540 series before packets are distributed for proper inclusion in the soldier's OMPF and MPRJ.

c. USAR affiliation bonus applicants from other U.S. Armed Forces will be processed for enlistment by the U.S. Army Recruiting Command per AR 601–210, chapter 3. DA Form 5261–3–R will be attached to each copy of the DA Form 3540 and included in each enlistment packet.

5–4.1. Continuing entitlement on transfer between Reserve Components of the Army

Entitlement to receive a subsequent bonus payment on transfer between the Reserve Components of the Army (ARNGUS and USAR) is prescribed by this paragraph.

a. On transfer from a USAR Selected Reserve TPU to the ARNGUS. A USAR soldier entitled to a bonus payment on the 6th anniversary date specified in paragraph 5–2a(2) will receive the subsequent bonus payment. This is provided the soldier remains eligible and termination (para 5–5) is not required, or the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination.

b. On transfer from the ARNGUS to a USAR Selected Reserve TPU. An ARNGUS soldier entitled to a bonus payment on the 6th anniversary specified in paragraph 5–2a(2) will receive the subsequent bonus payment. This is provided the soldier remains eligible and termination (para 5–5) is not required, or the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination.

c. Eligibility upon transfer. A soldier who is not eligible for the affiliation bonus under this chapter as a member of the losing Reserve Component of the Army does not gain bonus eligibility on becoming a member of the gaining Reserve Component of the Army. The transfer process does not meet the REFRAD/transfer policy specified in paragraph 5–3a(4) for affiliation bonus eligibility.

5–5. Termination

Affiliation bonus entitlement will stop if the soldier—

a. Becomes an unsatisfactory participant under AR 135–91. The termination date entered into personnel data reporting systems must be the date the soldier attained his or her 9th unexcused absence (AR 135–91, para 4–11a), or the date the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135–91, para 4–13).

b. Accepts a permanent civilian position where membership in the Reserve is a condition of employment.

c. Becomes a participant in the ROTC/SMP on enrollment in the ROTC advanced course, or becomes an assigned member of Control Group (ROTC).

d. Separates from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason, except when separated for an authorized period of nonavailability per paragraph 1–15, or entry on AD or FTNGD in an AGR status. Separation includes, but is not limited to—

(1) Discharge, or transfer to the Individual Ready Reserve, Standby Reserve, or Retired Reserve.

(2) Enlistment or appointment in the Regular Army or in a Regular or Reserve Component of another U.S. armed force.

(3) Voluntary entry or order to extended active duty (EAD) (see glossary) in the Active Army (accessed to the strength accountability of the active military service of the Army).

(4) Appointment as a commissioned officer or warrant officer.

e. (*Rescinded*).

f. Completes the remaining statutory MSO.

g. Moves to a duty MOS (DMOS) in which he or she is not qualified. Bonus entitlement will not terminate if the soldier is moved to a DMOS in which he or she is not qualified and retention of bonus entitlement is authorized per paragraph 1–14.1, or if the move has been approved by the Chief National Guard Bureau or the Chief Army Reserve.

h. Is a drill sergeant who requests and accepts assignment to a nondrill sergeant duty position within the Selected Reserve, except when retention of the bonus entitlement is authorized per paragraph 1–14.1.

5–6. Recoupment conditions

Recoupment of affiliation bonus payment must be initiated by the unit commander at the time entitlement to such incentive is terminated based on the following condition:

a. Unsatisfactory participation (para 5–5a).

b. Acceptance of a permanent civilian position where Selected Reserve membership is a condition of employment (para 5–5b), before 6 months of the enlistment/term of service has been served.

c. Separation from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason unless due to—

- (1) Acceptance of an immediate appointment as an officer in the Ready Reserve after 1 year or more of the affiliation period has been satisfactorily served.
- (2) Entry on an authorized period of nonavailability per paragraph 1–15.
- (3) **(Rescinded.)**
- (4) Becoming an assigned member of Control Group (ROTC).
- (5) Death, injury, illness, or other impairment not the result of own misconduct.
- (6) Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force per paragraph 1–14.1
- (7) Involuntary order to EAD in the Active Army (accessed to the strength accountability of the active military service of the Army).
- (8) Entry on AD or FTNGD in an AGR status.

5–7. Settlement of accounts

Calculate affiliation bonus recoupment or balance due amounts as follows:

- a. Multiply the number of months served satisfactorily during the affiliation period for which the incentive was authorized by \$50.
- b. Subtract that amount from the total bonus paid to the soldier to date (initial plus any later payments).
- c. If the calculation indicates overpayment to the soldier, that amount will be recouped.
- d. If the calculation indicates that the soldier has earned more than he or she has been paid to date on the same pro-rata basis, that amount will be paid in a final installment.

Chapter 5.1 Student Loan Repayment Program

5.1–1. General

- a. This chapter gives guidance for the administration of the Student Loan Repayment Program (SLRP). Public Law 99–145, section 671(a)(1), authorizes student loan repayment for qualified Selected Reserve enlisted personnel. This incentive is offered to qualifying nonprior, prior, and in– service personnel on signing a contractual agreement for a specified term of service in the Selected Reserve and executing DA Form 5261–4–R (Student Loan Repayment Program Addendum) between 1 October 1980 to 30 September 1981 and 1 October 1982 until rescinded.
- b. Selection of the SLRP incentive and execution of DA Form 5261–4–R must be made by the person when he or she signs a Selected Reserve contractual agreement (see para 5.1–10). The applicant may select the SLRP incentive even though he or she has no outstanding loan when signing the contractual agreement (see para 5.1–10). A Selected Reserve contractual agreement is executed when a person enlists, reenlists, immediately reenlists, or extends in the Selected Reserve of the Army. These contractual agreements are governed by AR 140– 111, AR 601–210, and NGR 600–200. (An extension of a USAR enlistment or reenlistment agreement will not serve to qualify a USAR soldier for the SLRP.) The SLRP may be offered to a soldier regardless of the number of years time–in–service (TIS) the soldier has at the time he or she meets the SLRP eligibility criteria.
- c. The SLRP may be combined with any other SRIP. In these cases the eligibility criteria of both programs must be met.

5.1–2. Scope

- a. The SLRP incentive provides for the repayment by the Government of a designated portion of any outstanding loan(s) secured after 1 October 1975. Subject to this chapter, any loan made, insured or guaranteed under Part B of the Higher Education Act of 1965, or any loan made under Part E of this Act, after 1 October 1975, may be repaid.
- b. The following loans qualify for repayment. However, these loans must have been incurred after 1 October 1975 or qualifying periods of Selected Reserve service after 1 Oct 80.
 - (1) Stafford Loan Program (formerly Guaranteed Student Loans (GSL)).
 - (2) Federally Insured Student Loans (FISL).
 - (3) Perkins Loan (formerly National Defense Student Loan and National Direct Student Loans (NDSL)).
 - (4) Auxiliary Loans to Assist Students (ALAS) .
 - (5) **(Rescinded.)**
 - (6) Supplemental Loans for Students (SLS).
 - (7) Consolidated Loan Program (CLP).
 - (8) SMART Loans. (See para 5.1–9.)
- c. **(Rescinded.)**
- d. For each year of satisfactory service in the Selected Reserve, the loan amount to be repaid will be as follows:

(1) If the amount of the loan or loans *does not exceed* the designated maximum portions authorized *ine* below, the amount of annual repayment is 15 percent of the original balance of the loan or loans, plus accrued interest not paid by the Department of Education, or \$500 plus the accrued interest not paid by the Department of Education, whichever is greater.

(2) If the amount of the loan or loan*sexceed* the designated portions authorized *ine* below, the amount of annual repayment is 15 percent of the designated maximum portion, plus the accrued interest not paid by the Department of Education. This equates to a maximum annual repayment of \$1,500, or effective 1 Mar 88, \$3,000 per paragraph *e* below, plus the accrued interest. If the amount set for repayment is less than \$500, then \$500 becomes the calculated amount for repayment in that year.

e. The maximum amount of the loan or loans is not regulated. *However, the monetary units in subparagraphs (1) and (2) below represent the maximum SLRP benefit available throughout a soldier's service as a Reserve of the Army (ARNGUS and USAR combined).* (See para 5.1–10.) Once a dollar amount of \$10,000 is established for SLRP, it cannot be increased to \$20,000 during the soldier's career. The SLRP incentive provides for the repayment of a designated portion of an outstanding loan or loans identified *inb* above. Effective 1 Jan 92, the designated maximum portion authorized for loan repayment is—

(1) \$20,000 for a soldier who contracts for a critical MOS that has been established by HQDA (DAPE–MPA) for the SLRP increased incentive. This incentive is authorized only for service in the USAR.

(2) \$10,000 for a soldier who contracts for an MOS in the Selected Reserve of the ARNGUS or USAR that has been authorized by HQDA for the SLRP incentive.

f. A soldier participating in the SLRP will be eligible to have repayment apportioned with proper fractional credit for each portion of the year served if the soldier—

(1) Enters on AD in an Active component of a U.S. armed force; or

(2) Enters on AD in an AGR status and is terminated per paragraph 5.1–6*h*; or

(3) Is transferred or reassigned to the IRR as a direct result of a reduction of overstrength, reduction in force, unit deactivation, or unit relocation, per paragraph 1–14.1.

(4) Is entitled to the maximum \$20,000, transfers to the ARNGUS and retains eligibility to participate in the SLRP at the \$10,000 maximum level.

g. (Rescinded.)

5.1–3. Eligibility

The Government will repay a designated portion of an eligible soldier's outstanding loan or loans, which qualify per paragraph 5.1–2*b*, under the procedures described in paragraph 5.1–2*d*, within the maximum limits established by paragraph 5.1–2*e*. An eligible soldier is who—

a. Enlists, reenlists, immediately reenlists, or extends in the Selected Reserve per AR 140–111, AR 601–210, or NGR 600–200, as appropriate.

b. Contracts for a term of service in the Selected Reserve as follows:

(1) A prior service or in-service soldier must enlist, reenlist, immediately reenlist, or extend for 3 or more years for service in the Selected Reserve. (NOTE: A soldier who is reenlisting or extending (ARNGUS only) for 3 or more years to qualify for Montgomery GI Bill entitlement (chap 8) may simultaneously contract to participate in the SLRP, if eligible. In this case, the soldier is not required to be within a specified period prior to a current ETS date.)

(2) A nonprior service (NPS) applicant must be classified in Mental Category I, II, IIIA (Armed Forces Qualification Test) and must enlist with an initial Selected Reserve term of service of at least 6 years with a concurrent 8-year military service obligation (MSO) (8x0 or 6x2 enlistment options).

(3) A soldier being REFRAD after 28 Feb 92 from the Active Army with a remaining statutory military service obligation and reassigned to a USAR TPU, may be contracted by TPU officials for participation in the SLRP. This is provided the soldier meets all of the following conditions. The soldier—

(*a*) Is not contracting for Selected Reserve service to gain entitlement to increased educational assistance under the Montgomery GI Bill 2 x 4 Program (para 9–5*a*).

(*b*) Has joined and is participating satisfactorily with the USAR TPU to which assigned on REFRAD.

(*c*) Meets the reenlistment eligibility criteria per AR 140–111, table 2–1.

(*d*) Immediately reenlists in the USAR for a term of service that is, by whole years, equal to or greater than the remaining term of the statutory military service obligation (but not less than 3 years) per AR 140–111, table 2–3, line 3.

(*e*) Is contracting to serve in an MOS (*c* below) which has been authorized by HQDA for the SLRP incentive.

(*f*) Executes a DA Form 5261–4–R.

c. Contracts on or after 1 January 1992 to serve in the Selected Reserve of—

(1) The ARNGUS or USAR in an MOS authorized by HQDA for the SLRP incentive (para 5.1–2*e*(2)). A soldier with previous service (PS) or who is in-service must be qualified and have been awarded the MOS in which contracting; or

(2) The USAR in a critical MOS that has been established by HQDA for the SLRP increased incentive (para 5.1–2e(1)). A soldier with PS or who is in-service must be qualified and have been awarded the MOS in which contracting.

(3) The USAR as a drill sergeant. The soldier must be a qualified drill sergeant that has been awarded SQI “X”.

c.1. Completes a DA Form 5261–4–R (Student Loan Repayment Program Addendum). (A reproduction master copy of this form appears at the end of this volume and will be locally reproduced on 8 1/2– by 11–inch paper.) (See para 5.1–10 regarding the longevity of DA Form 5261–4–R.)

d. *(Rescinded.)*

e. Is a secondary school graduate as defined in paragraph 1–7.1.

f. *(Rescinded.)*

g. Is not contracting to qualify for a permanent civilian position where membership in the ARNGUS or USAR is a condition of employment.

5.1–4. Entitlement

A soldier will not be eligible for any initial or subsequent loan repayments until he or she—

a. Has completed IADT.

b. Is MOS qualified or received sufficient training to be deployed.

c. Has been awarded a high school diploma or otherwise qualifies as a secondary school graduate as prescribed by paragraph 1–7.1d and shows proof of such status within the time frame established in paragraph 1–7.1a.

d. Has served 1 year in the Selected Reserve after securing the loan or loans.

e. Has reached the anniversary date of the Selected Reserve contract for SLRP participation.

5.1–4.1. Counseling

a. Commanders will ensure that a soldier who contracts for the SLRP has been counseled by a service representative regarding the soldier’s obligations and responsibilities as cited on DA Form 5261–4–R (Student Loan Repayment Program Addendum).

b. Commanders should ensure the soldier is aware that it is the soldier’s responsibility to—

(1) Make arrangements for deferment or forbearance with lenders or notes holders on loans which are falling due; and

(2) Initiate the request for loan(s) repayment during each year the soldier meets the requirements cited on DA Form 5261–4–R by completing DD Form 2475 (DOD Educational Loan Repayment Program (LRP) Annual Application) and submitting it to the personnel officials of his or her assigned command.

5.1–5. Obligation

To be eligible for the SLRP incentive, a person must contractually obligate himself or herself to serve satisfactorily per AR 135–91. A person must serve in the Selected Reserve for the full term of the contractual agreement per paragraph 5.1–3b. He or she must further obligate himself or herself to continue to serve in the same component and the same MOS unless excused for the convenience of the Government.

5.1–5.1. Continuing entitlement on transfer between Reserve Components of the Army

Entitlement to continuing loan repayment on transfer between the Reserve Components of the Army (ARNGUS and USAR) is prescribed by this paragraph.

a. On transfer from the USAR Selected Reserve to the ARNGUS.

(1) A USAR soldier eligible for loan repayment at the \$20,000 level (para 5.1–2e(1)) will terminate entitlement under the SLRP on transfer to the ARNGUS. However, if the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination, or otherwise authorized by the Chief, National Guard Bureau, the soldier will retain entitlement under the SLRP but only at the \$10,000 level.

(2) A USAR soldier eligible for loan repayment at the \$10,000 level (para 5.1–2e(2)) will terminate entitlement under the SLRP on transfer to the ARNGUS, unless the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination, or otherwise authorized by the Chief, National Guard Bureau.

b. On transfer from the ARNGUS to the USAR Selected Reserve.

(1) An ARNGUS soldier eligible for loan repayment will retain entitlement under the SLRP at the same level on transfer to the USAR, provided the soldier is otherwise eligible. This is further provided the soldier continues to serve in the contracted MOS, or the transfer is based on the provisions of paragraph 1–14.1 in circumstances not requiring termination, or otherwise authorized by the Chief, Army Reserve.

(2) An ARNGUS soldier eligible for loan repayment at the \$10,000 level (para 5.1–2e(2)) and assigned to a critical MOS position in the USAR is not authorized to contract for the \$20,000 level. The soldier will retain entitlement under the SLRP at the \$10,000 level on transfer to the USAR, provided the soldier is otherwise eligible.

c. Eligibility upon transfer. A soldier who is not eligible for the SLRP under this chapter as a member of the losing

Reserve Component of the Army does not gain SLRP eligibility by virtue of membership in the gaining Reserve Component of the Army. The transfer process does not correspond to the procedures establishing eligibility per paragraph 5.1–3.

5.1–6. Termination

Entitlement to the SLRP will stop if the soldier—

a. Receives the maximum SLRP benefit available equating to \$10,000 or \$20,000, as appropriate, per paragraph 5.1–2*e*.

b. Moves to another MOS, or is reclassified in an MOS, other than that for which contracted. Except as provided in paragraph 5.1–5.1*a*, entitlement under the SLRP will not terminate if the soldier is moved to another MOS in a Selected Reserve unit—

- (1) For normal career progression (AR 611–201); or
- (2) When retention of SLRP entitlement is authorized per paragraph 1–14.1; or
- (3) When the move has been approved by the Chief, National Guard Bureau or Chief, Army Reserve.

c. Becomes an unsatisfactory participant under AR 135–91. For TPU personnel, the termination date entered into personnel data reporting systems must be the date the soldier attained his or her 9th unexcused absence (AR 135–91, para 4–11*a*), or the date the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135–91, para 4–13).

d. Accepts a permanent civilian position where membership in the ARNGUS or USAR is a condition of employment.

d.1. Is enrolled as a cadet in an officer training program.

e. Fails to extend the contracted term of service for a period of nonavailability (para 1–16).

f. Exceeds the maximum period authorized for suspension (para 1–15).

g. Separates from enlisted status in a Selected Reserve unit of the ARNGUS or USAR for any reason, except when separated for an authorized period of nonavailability per paragraph 1–15. Separation includes, but is not limited to—

- (1) Discharge, or transfer of the Individual Ready Reserve, Standby Reserve, or Retired Reserve.
- (2) Enlistment or appointment in the Regular Army or in a Regular or Reserve Component of another U.S. armed force.
- (3) Voluntary entry or order to extended active duty (EAD) (see glossary) in the Active Army (accessed to the strength accountability of the active military service of the Army).

(4) Appointment as a commissioned officer or warrant officer.

h. If a soldier is ordered to AD in an AGR status under 10 USC 12301(d), SLRP eligibility will be terminated if—

- (1) This is the soldier's initial entry on AD, and
- (2) He or she is enrolled in the active duty entitlement portion of the Montgomery GI Bill per chapter 10 of this regulation.

i. Was attending high school at time of enlistment and does not become a secondary school graduate within the required time frame (para 1–7.1*b*).

j. Transfers to the ARNGUS except where the soldier's current USAR unit is reorganized, relocated, redesigned, inactivated, or converted (para 1–14.1), or where the transfer has been approved by the Chief National Guard Bureau.

5.1–7. Administration

DD Form 2475, Mar 93, with DD Form 2475 (Back) (Instructions) is initiated (para 5.1–4.1*b*) on an eligible soldier's anniversary date (para 5.1–2*d*) and used to process claims of eligible participants.

a. Part I is completed by the soldier and surrendered to the soldier's unit personnel officer, personnel NCO (PSNCO), or personnel services support team (PSST). An IMA soldier will send the form to Commander, U.S. Army Reserve Personnel Center, ATTN: DARP–PAT–A, 9700 Page Boulevard, St. Louis, MO 63132–5200.

b. The unit, PSST, or Cdr, ARPERCEN (DARP–PAT–A) (for an IMA soldier) will complete Part II and send the form to the appropriate lending agency.

c. The lending agency completes Part III and returns the form to the unit or PSST for forwarding to the appropriate Finance and Accounting office. For an IMA soldier, the lending agency completes Part III and returns the form to Commander, U.S. Army Reserve Personnel Center, ATTN: DARP–PAT–A, 9700 Page Boulevard, St. Louis, MO 63132–5200. Cdr, ARPERCEN (DARP–PAT–A) will send the IMA soldier's completed form to HQDA, Finance and Accounting Office (JDRS–FAO–M).

5.1–8. Calculating entitlement and making disbursement

a. Examples are given below.

(1) *Case 1:* A single loan from one lender or note holder is outstanding at the time a soldier contracts for a Selected Reserve term of service and completes DA Form 5261–4–R.

- (2) *Case 2:* Multiple loans from one lender or note holder are outstanding at the time a soldier contracts for a Selected Reserve term of service and completes DA Form 5261-4-R.
- (3) *Case 3:* Multiple loans from multiple lenders or note holders are outstanding at the time a soldier contracts for a Selected Reserve term of service and completes DA Form 5261-4-R.
- (4) *Case 4:* A single loan is incurred after the date of the Selected Reserve contract and completion of DA Form 5261-4-R.
- (5) *Case 5:* Multiple loans, some incurred before the date of the Selected Reserve contractual agreement and completion of DA Form 5261-4-R, some obtained after the date of the Selected Reserve contractual agreement and completion of DA Form 5261-4-R.
- b.* In Cases 1 and 2 shown in *a*(1) and (2) above, the total outstanding balance at the time a soldier contracts for a Selected Reserve term of service and completes DA Form 5261-4-R will be reduced by 15 percent, or \$500, whichever is greater, for each year of service completed (a maximum of 6 years). Entitlement will be calculated on the anniversary date of the contractual commitment. In addition, any interest due will be paid in full. All disbursements will be paid to the lender or note holder. Disbursement will not exceed indebtedness.
- c.* Entitlement is calculated for Case 3 in *a*(3) above in the same manner as for Case 2. However, the disbursement will be made to each lender or note holder in an amount equal to the lender's or note holder's pro rata share of the principal outstanding when the entitlement is calculated.
- d.* Entitlement is not earned in Case 4 in *a*(4) above unless the soldier has served 1 year in the Selected Reserve after securing the student loan. Entitlement will still be calculated on the anniversary date of the soldier's Selected Reserve contractual agreement and completion of DA Form 5261-4-R. If necessary, a proportional payment will be made as part of the first disbursement for entitlement earned in excess of 12 months. This is shown in the following example:
- (1) 1 Oct 80, the soldier signed a Selected Reserve contractual agreement and completed DA Form 5261-4-R.
- (2) 1 Apr 81, the soldier borrowed \$1,000 (GSL Federal Loan).
- (3) 1 Oct 81, on the first anniversary of the Selected Reserve contract and completed DA Form 5261-4-R, the loan had not been outstanding a full 12 months; thus no disbursement will be made.
- (4) 1 Oct 82, entitlement is calculated as follows:
- (a) For the period from 1 Apr 81 to 1 Oct 81: 15 percent, or \$500 whichever is greater, on the outstanding balance of \$1,000 for 6 months ($\frac{1}{2}$ year), which equals \$250.
- (b) For the period from 1 Oct 81 to 1 Oct 82: 15 percent, or \$500 whichever is greater, on the outstanding balance of \$1,000, which equals \$500.
- (c) All interest due (estimated at 7 percent per year) equals \$105. Total Entitlement equals \$855.
- (5) 1 Oct 83, on each subsequent anniversary of the Selected Reserve contract and completed DA Form 5261-4-R, entitlement will be based on 12 months of service completed in the past year. Disbursements will not exceed indebtedness.
- e.* Multiple loans, described in *a*(5) above, could be incurred with a single lender or note holder or multiple lenders or note holders. Therefore—
- (1) For a single lender or note holder, the loan incurred after the date of the contractual commitment earns in excess of 12 months of entitlement, much like the loan in Case 4. That entitlement is combined with the entitlement of loans secured before the date of the contractual commitment in the following manner:
- (a) 1 Sep 77, a student borrowed Loan A: \$2000—GSL.
- (b) 1 Sep 78, the student borrowed Loan B: \$1000—GSL.
- (c) 1 Oct 80, the student enlisted in the Selected Reserve, completed DA Form 5261-4-R, and was eligible to participate in the SLRP.
- (d) 1 Dec 80, the student borrowed Loan C: \$1000—NDSL.
- (e) 1 Oct 81, Loan A and Loan B have an earned entitlement of \$500. Loan C has no entitlement because the soldier has not completed 12 months of service since securing the loan.
- (f) 1 Dec 81, the soldier has completed 12 months of service since securing Loan C, but entitlement is only calculated on the anniversary of the enlistment date.
- (g) 1 Oct 82, Loan A and Loan B have earned another 12 months of entitlement each. Loan C has now accumulated 22 months of entitlement. Additional calculations are required when a loan has earned more than 12 months of entitlement and there is more than one loan to be paid. The method is more easily explained by the example in appendix B (Worksheet for Case 5). In summary, the total disbursement is \$725.
- (h) 1 Oct 83, entitlement is paid on the outstanding balance of Loans A + B + C. According to appendix B, \$600 is paid to the lender or note holder.
- (i) 1 Oct 84, again, \$600 is paid to the lender or note holder in this year and in each consecutive year, until the soldier completes 6 years Selected Reserve service, leaves the service, or the debt is repaid in full.
- (2) If there are multiple loans and lenders or note holders, calculating entitlement is done in the same manner as shown in *a*(5) above, in Case 5 where these are multiple loans and a single lender or note holder.

(a) Making disbursement requires special consideration. On or about the date of the soldier's contract anniversary, each lender or note holder receives a loan repayment made against the loan note the lender or note holder holds in behalf of the soldier. For example, the entitlement earned on Loan A plus all interest due on Loan A is disbursed to the holder of that loan.

(b) If the minimum of \$500 is earned against all loans outstanding, each lender or note holder receives a share of the \$500 equal to the lender's or note holder's share of the principal outstanding eligible for repayment, plus all interest due on the loan. Appendix B shows the 1 Jul 82 disbursement that is made to three lenders or note holders.

5.1–9. Disbursement of consolidated loans

A lender or note holder may consolidate all previous loans into a new note each time a soldier obtains a new loan to cover the current year's expenses, or when the note is sold to a new lender. (For example, loans authorized for repayment per paragraph 5.1–2b above, that may be consolidated in a SMART loan). However, in such a case when the soldier reaches the anniversary date, the loan is still not at least 12 months old. In such a case, disbursement will be made based on that portion of the consolidated loan (the original principle plus interest) which is 12 months old when the soldier reaches his or her anniversary date in Selected Reserve and the consolidated loan is not a full 12 months old. For example, on 1 June 1989, the soldier enlisted in the Selected Reserve. On 15 September 1989, the soldier enlisted in the Selected Reserve. On 15 September 1989, the soldier borrowed \$2,000. On 31 May 1990, the first anniversary date in the Selected Reserve, the loan is not outstanding 12 full months and no disbursement is made. On 15 September 1990, the soldier borrows an additional \$2,000. The note holder consolidates the original loan and issues a new note on 15 September 1990 for \$4,000. On 31 May 1991, the second anniversary date in Selected Reserve, the note is still not outstanding 12 full months.

5.1–10. Longevity of DA Form 5261–4–R

Effective 1 January 92—

a. Once a soldier has enlisted, reenlisted, immediately reenlisted, or extended and executed a DA Form 5261–4–R to participate in the SLRP per paragraph 5.1–1b, the provisions of the DA Form 5261–4–R will remain in force until the earlier occurrence of one of the following:

- (1) Participation in the SLRP is terminated under paragraph 5.1–6.
- (2) The maximum SLRP benefit of \$10,000 or \$20,000, as appropriate, has been paid.
- (3) The soldier transfers between the Reserve Components of the Army (ARNGUS and USAR). If the soldier is authorized to continue under the SLRP (para 5.1–5.1) a new DA Form 5261–4–R must be prepared, however, this act does not create a renewed entitlement to an additional \$10,000 or \$20,000 maximum SLRP benefit, but retains the soldier as a SLRP participant under the current \$10,000 maximum SLRP benefit. (See para 5.1–2e.)

b. Having once executed the DA Form 5261–4–R, it need not be again executed on subsequent reenlistments or extensions for continued Selected Reserve participation in the same component. This is provided the soldier has continuous Selected Reserve service and has not been terminated under (1) or (2) above.

c. The provisions of DA Form 5261–4–R terminate when a soldier separates from the Selected Reserve. However, if after a break in Selected Reserve service of more than 24 hours, a soldier who meets the eligibility requirements of paragraph 5.1–3 subsequently enlists or reenlists, a new DA Form 5261–4–R may be executed. This does not constitute a new contract for an additional \$10,000 or \$20,000 maximum SLRP benefit and is only authorized where the maximum SLRP benefit of \$10,000 or \$20,000, as appropriate, has not been previously paid. If otherwise eligible, on reentry in the Selected Reserve the soldier is only entitled to SLRP payments which equal the maximum authorized SLRP benefit minus any previous SLRP payments.

Chapter 5.2 Individual Ready Reserve Bonus Program

5.2–1. General

(Rescinded.)

5.2–2. Responsibilities

(Rescinded.)

5.2–3. IRR bonus

(Rescinded.)

5.2–4. Eligibility

(Rescinded.)

5.2–5. Obligation

(Rescinded.)

5.2–6. Bonus entitlement

(Rescinded.)

5.2–7. Termination

(Rescinded.)

5.2–8. Recoupment

(Rescinded.)

5.2–9. Required bonus agreement

(Rescinded.)

5.2–10. Administrative processing

(Rescinded.)

Chapter 6

Inactive National Guard and Individual Ready Reserve Bonus Program

6–1. General

(Rescinded.)

6–2. Continued entitlement responsibility

(Rescinded.)

6–3. Termination of bonus entitlement

(Rescinded.)

6–4. Recoupment policy

(Rescinded.)

6–5. Refund amounts

(Rescinded.)

Chapter 7

Health Professionals Loan Repayment (HPLR) Program

7–1. General

This chapter provides policy and guidance for the administration of the Health Professionals Loan Repayment (HPLR) Program. Under section 16302, title 10, U.S. Code, the program is designed to repay designated loans secured by eligible commissioned officers of the Medical Corps (MC) and Army Nurse Corps (ANC) assigned to the Selected Reserve. Application for participation in the HPLR is not authorized after 30 September 1996.

7–2. Scope

a. Effective 1 Jul 86, the HPLR Program provides for the repayment by the Government of outstanding loan(s) that were secured after 1 Oct 75.

(1) Any loan made, insured, or guaranteed under part B or E of the Higher Education Act of 1965, may be repaid. These loans include:

- (a)* Stafford Loan Program (formerly Guaranteed Student Loans (GSL));
- (b)* Federally Insured Student Loans (FISL);
- (c)* Perkins Loan (formerly National Defense Student Loan and National Direct Student Loans (NDSL));
- (d)* Auxiliary Loans to Assist Students (ALAS).
- (e)* Parent Loans for Undergraduate Students (PLUS) provided the officer is the student using the loan.
- (f)* Supplemental Loans for Students (SLS).
- (g)* Consolidated Loan Program (CLP).

- (2) Any loan made or insured under part B or C, title VII, of the Public Health Service Act. These loans include:
- (a) Health Education Assistance Loans (HEAL).
 - (b) Income Contingent Loans (ICL).
- (3) A loan made, insured, or guaranteed through a recognized financial or educational institution if that loan was used to finance education regarding a health profession that the Secretary of Defense determines to be critically needed in order to meet identified wartime combat medical skill shortages. The loan contract must indicate that the loan was incurred for the purpose of education.
- b. Repayment of loans is made on the basis of each year of satisfactory service performed as a commissioned officer in the Selected Reserve. The total amount that may be repaid on all loans on behalf of any one officer under this program will not exceed \$20,000. Loans that are in default, or that are less than 1 year of age, will not qualify for repayment under this program. Disbursement will not exceed indebtedness.

7-3. Eligibility

For each year of satisfactory service in the Selected Reserve, the Government will repay designated loans (para 7-2) for an officer who—

- a. Is a Selected Reserve soldier.
- b. Is commissioned in the MC or ANC after 30 September 1985 and before 1 October 1996.
- c. Executes DA Form 5536-R (Health Professionals Loan Repayment Program—Agreement) (para 7-4).
- d. Is in good professional standing and has a current, valid medical/nursing license and, if required, a specialty certificate.
- e. Remains in the Selected Reserve in good standing.
- f. Is qualified and is performing in one of the following medical/nursing specialties:
 - (1) **(Rescinded.)**
 - (2) 60N Anesthesiologist.
 - (3) 61L Plastic Surgeon.
 - (4) 61J General Surgeon.
 - (5) 61K Thoracic Surgeon.
 - (6) 61M Orthopedic Surgeon.
 - (7) 61Z Neurosurgeon.
 - (8) 61W Peripheral Surgeon.
 - (9) 66E Operating Room Nurse.
 - (10) 66F Nurse Anesthetist.
 - (11) 66H Medical-Surgical Nurse.
 - (12) 66J Clinical Nurse.

7-4. Application to participate

- a. To apply for participation in the HPLR Program, the eligible officer will complete DA Form 5536-R (Selected Reserve Incentive Program—Health Professionals Loan Repayment Program—Agreement). *(A reproduction master copy of DA Form 5536-R is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.)*
- b. The agreement should be executed on assignment to the Selected Reserve or thereafter on meeting all eligibility criteria.
- c. The anniversary date for the repayment of loans is based on the date the officer completes the agreement. Each complete satisfactory year of Selected Reserve Service performed under the terms of the agreement will establish the anniversary for repayment of eligible loans.
- d. The completed agreement will be distributed in the following manner:
 - (1) The original copy:
 - (a) (ARNGUS Officers)—Will be incorporated as part of the accession packet. This copy will be filed in the officer's official military personnel file (OMPF).
 - (b) (USAR Officers)—Will be sent to Commander, ARPERCEN, ATTN: DARP-PRD-M, 9700 Page Boulevard, St. Louis, MO 63132-5200. This copy will be filed in the officer's official military personnel file (OMPF).
 - (2) A reproduced copy will be inserted in the officer's military personnel records jacket (MPRJ) by the custodian of the officer's records.
 - (3) A reproduced copy will be given to the officer.
 - (4) A reproduced copy will be sent to the U.S. Army Health Professional Support Agency, ATTN: SGPS-PD, 5109 Leesburg Pike, Falls Church, VA 22041-3258.

7-5. Entitlement

- a. On each anniversary date, any authorized loan will be considered eligible for repayment that—

(1) Has an outstanding balance on the principal.

(2) **(Rescinded.)**

(3) Has been secured for at least 1 year prior to the current anniversary date.

b. The designated amount of repayment to be made on the anniversary date of eligible loans is established as follows:

(1) Three thousand dollars (\$3,000) maximum aggregate per year, or the remaining balance of the loan(s), whichever is less.

(2) Total program repayments for all years will not exceed \$20,000.

c. The following repayment restrictions apply:

(1) The repayment cannot exceed the outstanding balance.

(2) The agreement (DA Form 5536-R) does not change the officer's obligation to the lender or holder of the note(s).

(3) **(Rescinded.)**

(4) Loan repayments previously made cannot be reimbursed.

7-6. Administration

a. The officer is responsible for notifying his or her unit commander, or Cdr, ARPERCEN (DARP-PAI-G) for an IMA officer, of loans secured and furnishing copies of each promissory note.

b. The officer will coordinate his or her repayment schedule with the unit commander, or Cdr, ARPERCEN (DARP-PAI-G) for an IMA officer. The officer must initiate repayment application procedures at least 60 days before the anniversary date.

c. Application for repayment will be made on DD Form 2475 (DOD Loan Repayment Program (LRP) Annual Repayment Application) Aug 86, with DD Form 2475 Reverse (Instruction Sheet).

(1) Part I is completed by the officer and surrendered to the officer's unit personnel officer, personnel NCO (PSNCO), or PSST. An IMA officer will send the form to Commander, U.S. Army Reserve Personnel Center, ATTN: DARP-PAI-G, 9700 Page Boulevard, St. Louis, MO 63132-5200.

(2) The unit, PSST, or Cdr, ARPERCEN (DARP-PAI-G) (for an IMA officer) will complete Part II and send the form to the appropriate lending agency.

(3) The lending agency completes Part III and returns the form to the unit or PSST for forwarding to the appropriate Finance and Accounting office. For an IMA officer, the lending agency completes Part III and returns the form to Commander, U.S. Army Reserve Personnel Center, ATTN: DARP-PAI-G, 9700 Page Boulevard, St. Louis, MO 63132-5200. Cdr, ARPERCEN (DARP-PAI-G) will send the IMA officer's completed form to the HQDA, Finance and Accounting Office (JDRS-FAO-M).

7-7. Voluntary Active Army assignment

An officer who voluntarily enters on active duty, assigned to the Active Army, and is placed on the Active Duty List (ADL), terminates his or her eligibility under the HPLR Program. However, the officer may be eligible for a partial loan repayment. The repayment will be prorated based on the number of whole months satisfactorily served in the Selected Reserve during the anniversary year he or she entered the Active Army.

7-8. HPLR Program suspension

a. Participants in the HPLR Program who incur a period of authorized nonavailability will be suspended from the HPLR Program (para 1-15). Loan repayments will not be made during a period of suspension.

b. In order to regain entitlement under the HPLR Program, the officer must be reassigned to the Selected Reserve within the limits specified in paragraph 1-15b. In addition, the officer must be eligible per paragraph 7-3 and complete a new HPLR Program agreement per paragraph 7-4.

c. Entitlement to subsequent repayments will resume on the anniversary date of satisfactory creditable Selected Reserve service adjusted for the period of nonavailability.

7-9. Termination

HPLR Program eligibility will be terminated if the officer—

a. Becomes an unsatisfactory participant under AR 135-91. For an officer assigned to a TPU, the termination date entered into personnel data reporting systems must be the date the officer attained his or her 9th unexcused absence (AR 135-91, para 4-11a), or the date the officer is determined to be an unsatisfactory participant for failing to attend or complete the entire period of annual training (AT) (AR 135-91, para 4-13).

b. Is separated from the Selected Reserve for any reason including voluntary entry on active duty in the Active Army and placement on the ADL. An exception to this is when the officer is separated for a period of nonavailability per paragraph 7-8.

- c. Transfers to a medical/nursing specialty not designated as a critical specialty. An exception is when the officer is transferred involuntarily at the direction of the National Guard Bureau or Office of the Chief, Army Reserve.
- d. Is not currently licensed or certified in the critical medical/nursing specialty designated in the agreement.
- e. *(Rescinded.)*
- f. Accepts a permanent civilian position where membership in the Selected Reserve is a condition of employment.
- g. Exceeds the maximum period authorized for suspension (para 1–15b).

7–10. Recoupment

- a. As repayments are applied at yearly anniversaries and then only on certification, recoupment as a result of termination under paragraph 7–9 above is not required.
- b. In the case of an erroneous certification or payment, the total amount erroneously paid will be recouped.

Chapter 8

Educational Assistance Program for Members of the Selected Reserve (Selected Reserve Montgomery GI Bill)

8–1. General

This entitlement is codified in Title 10, U.S. Code, chapter 1606 (Educational Assistance for Members of the Selected Reserve), regulated by the Secretary of Defense and administrated by the Secretary of Veterans Affairs. This chapter provides the Army National Guard of the United States (ARNGUS) and the U.S. Army Reserve (USAR) with guidance and procedures necessary to support the educational assistance program in compliance with Department of Defense (DOD) and Department of Veterans Affairs (DVA) regulations. The short title for this for this program is the Selected Reserve Montgomery GI Bill (Sel Res MGIB).

8–2. Scope

Congress enacted the Sel Res MGIB to encourage membership in units of the Selected Reserve of the Ready Reserve. It provides educational assistance to officers, warrant officers, and enlisted soldiers of the Selected Reserve, other than those serving in an Active Guard Reserve (AGR) status, who agree to remain members of the Selected Reserve for a period of not less than 6 years.

- a. In determining Sel Res MGIB entitlement under this chapter, the Selected Reserve of the Ready Reserve includes units of the ARNGUS, troop program units of the USAR, and individual soldiers assigned under the Individual Mobilization Augmentee (IMA) Program.

- b. Excluded from entitlement under this chapter are Selected reserve soldiers serving in an Active Guard Reserve (AGR) status per AR 135–18. A soldier may not receive credit under the Sel Res MGIB for service (in any grade) on full-time active duty or full-time National Guard duty for the purpose of organizing, administering, recruiting, instructing, or training the Reserve Components in an authorized AGR position included in the end strength of the Selected Reserve.

8–3. Eligibility

A soldier is eligible for educational assistance under the Sel Res MGIB when he or she meets all of the following requirements:

- a. After 30 Jun 85, contracts to serve for not less than 6 years in the Selected Reserve. The applicant—
 - (1) Enlists, reenlists, or extends an enlistment as a Reserve of the Army, for service in the Selected Reserve (para 8–2a) for a period of not less than 6 years; or
 - (2) Is appointed, or is serving, as a reserve officer or warrant officer and agrees to serve in the Selected Reserve for a period of not less than 6 years. The 6 years must be in addition to any other period of obligated service in the Selected Reserve to which the officer may be subject.
- b. Has completed the requirements of a secondary school diploma, or an equivalency certificate (see consolidated glossary, Education Levels, paras a and b). In the case of a soldier—
 - (1) Having no previous military service, or having not previously completed required initial entry training (IET), the soldier must complete these educational requirements before completion of initial active duty for training (IADT), including the alternate (split) training option.
 - (2) Currently in service, or having previous military service, the soldier must have completed these educational requirements before enlisting, reenlisting, or extending a current enlistment.
- c. Has completed required initial active duty for training (IADT) (AR 135–200, chap 5) or equivalent. (Does not apply to officers or warrant officers.)
- d. The soldier—
 - (1) Is not receiving financial (scholarship) assistance under 10 USC 2107 as a member of the ROTC Program. A

soldier who gained entitlement to educational assistance under the Montgomery GI Bill retains such entitlement on conversion to ROTC (nonscholarship) cadet status and participation in the ROTC Simultaneous Membership Program (SMP); or

(2) Is not serving on full-time active duty or full-time National Guard duty in an Active Guard Reserve (AGR) status for the purpose of organizing, administering, recruiting, instructing, or training the ARNGUS or USAR. A soldier entering, or serving, on AGR status who gained entitlement under the Sel Res MGIB prior to entry on AGR status continues to retain entitlement for that portion of Selected Reserve service not performed in an AGR status. The period of service performed in an AGR status may not be credited toward entitlement under the Sel Res MGIB.

e. Has been issued a notice of basic eligibility (NOBE) per paragraph 8-6.

8-4. Required statement of understanding

On assignment to the Selected Reserve (para 8-2a, each soldier will complete DA Form 5435-R (Statement of Understanding The Selected Reserve Montgomery GI Bill (10 USC Chap 1606). (A reproduction master copy of DA Form 5435-R is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.) The NGB, OCAR, Cdr, USAREC, Cdr, ARPERCEN, area commands, subordinate commands, will ensure prompt completion of this statement following assignment to the Selected Reserve regardless of eligibility status. DA Form 5435-R explains eligibility requirements for entitlement under the Sel Res MGIB and ensures the soldier's understanding of these requirements and entitlements is a matter of record. A copy of the completed DA Form 5435-R will be filed in the soldier's official military personnel file (OMPF). For USAR soldiers, a copy will be sent directly to Commander, U.S. Army Reserve Personnel Center, ATTN: ARPC-PRD-M, 9700 Page Boulevard, St. Louis, MO 63132-5200.

8-5. Service agreements

The authority and the procedures necessary to satisfy the contractual service obligation required by paragraph 8-3a for Sel Res MGIB eligibility are cited in the following paragraphs.

a. By enlisting, reenlisting, or extending a current enlistment. If enlisting, reenlisting, or extending a current enlistment, the service agreement must contain a contractual obligation to serve in the Selected Reserve (para 8-2a for a term of not less than 6 years.

(1) An applicant having no previous military service will be processed for the 6X2 or 8X0 enlistment options as prescribed by AR 601-210, chapter 2, or NGR 600-200, chapter 2, as appropriate.

(2) An applicant having previous military service will be processed for enlistment with assignment to the Selected Reserve, as prescribed by AR 601-210, chapter 3, AR 601-280, chapter 11, or NGR 600-200, chapter 2, as appropriate.

(3) A current member of the Selected Reserve will be processed for retention in the Selected Reserve by reenlistment, or the extension of an enlistment, as prescribed by AR 140-111, chapter 9, or NGR 600-200, chapter 7, as appropriate.

b. By completing DA Form 5447-R (Officer Service Agreement Selected Reserve Educational Assistance Program Short Title: The Montgomery GI Bill) an officer or warrant officer incurs a contractual service obligation to serve in the Selected Reserve for at least 6 years in addition to any other Selected Reserve obligation. (A reproduction master copy of DA Form 5447-R is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.)

8-6. The notice of basic eligibility (NOBE)

When a soldier meets all of the eligibility criteria outlined in paragraph 8-3a through d above, he or she will be issued a DD Form 2384 (Selected Reserve Educational Assistance (GI Bill) Notice of Basic Eligibility) or, DD Form 2384-1 (Notice of Basic Eligibility) (NOBE). Following issuance of a NOBE, the soldier may apply to the Department of Veterans Affairs for educational assistance. The NOBE is a safeguarded form and it will not be distributed below battalion level. It is available through normal forms supply channels.

a. ARNGUS soldiers and USAR TPU soldiers will be furnished a NOBE by their unit officials. Copies of the NOBE will be distributed as follows:

(1) The original will be given to the soldier to support his or her application for benefits to the Department of Veterans Affairs.

(2) A copy will be inserted in the soldier's MPRJ.

(3) A copy will be provided to the SIDPERS input station.

(4) A copy will be inserted in the soldier's OMPF.

b. Sel Res MGIB program administration and data reporting for USAR soldiers not assigned to a troop program unit (TPU) is the responsibility of ARPERCEN (ARPC-PAI). Enrollment, to include issuance of the NOBE, will be accomplished between the USAR soldier and his or her personnel management officer (PMO) or career adviser (CA) at ARPERCEN. Copies of the NOBE will be distributed as follows:

(1) The original will be given to the soldier to support his or her application to the Veterans Administration.

(2) A copy will be inserted in the soldier's MPRJ.

(3) A copy to ARPERCEN (ARPC-PAI).

- (4) A copy will be inserted in the soldier's OMPF.

8-7. Educational assistance

a. The Department of Veterans Affairs will provide educational assistance under the Sel Res MGIB to an eligible soldier pursuing a program of education approved by the Department of Veterans Affairs. A program of education includes undergraduate, vocational, technical, flight training, graduate, and post graduate courses..

b. Eligible soldiers are entitled to educational assistance to pursue a program of education at a rate determined by the Department of Veterans Affairs and announced by a HQDA memorandum on an annual basis.

c. The maximum benefit period is 36 months based on full-time status, or 48 months based on 3/4-time status, or 72 months based on 1/2-time status, or the number of months determined by the Department of Veterans Affairs based on less than 1/2-time status.

8-8. Duplication of benefits

Soldiers entitled to receive benefits under any of the programs listed below are not eligible to receive benefits under the Sel Res MGIB, as prescribed by this chapter, at the same time. The soldier must select the educational assistance program desired according to counseling provided by the Department of Veterans Affairs.

a. Basic Educational Assistance Entitlement for Service on Active Duty (Short Title: Montgomery GI Bill for Active Duty service (chapter 30, title 38, United States Code (38 USC 30)). (See chap 10.)

b. Educational Assistance for Personnel Enlisting for Active Duty (chapter 107, title 10, United States Code (10 USC 107)).

c. Basic Educational Assistance Entitlement for Service in the Selected Reserve (Short Title: Montgomery GI Bill 2 X 4 Program) (chapter 30, title 38, United States Code (38 USC 30)). (See chap 9.)

d. Army Continuing Education System (ACES) (section 2007, title 10, United States Code (10 USC 2007)) (See AR 621-5.)

8-9. Individual application procedures

To apply for educational assistance under the Sel Res MGIB an eligible soldier should—

a. Obtain a VA Form 22-1990 (Application for Educational Benefits).

(1) Call or write the nearest Department of Veterans Affairs regional office to obtain the form.

(2) Consult the local telephone directory under "U.S. Government, Veterans", for the toll-free number to call a Department of Veterans Affairs representative.

(3) Obtain a NOBE (para 8-6).

b. Select a school or program.

(1) Obtain information about approved programs from the Department of Veterans Affairs regional office serving the area where the school(s) is located.

(2) Select a program which is approved for the enrollment of veterans and eligible persons.

(3) Select a college, university, or other institution of higher learning.

c. Complete and submit VA Form 22-1990.

(1) Complete the form.

(2) Send the form and your NOBE directly to the Department of Veterans Affairs regional office as early as possible before planning to enroll.

(3) If already enrolled, give the completed form and NOBE to the school's certifying official for submission to the Department of Veterans Affairs with a VA Form 22-1990 (Enrollment Certificate).

8-10. Termination of entitlement

Eligibility for educational assistance under the Sel Res MGIB ceases if an enrolled soldier—

a. Is declared an unsatisfactory participant per AR 135-91, chapter 4. For soldiers assigned to a TPU, the termination date entered into personnel data reporting systems must be the date the soldier attained his or her 9th unexcused absence (AR 135-91, para 4-11a, or the date the soldier is determined to be an unsatisfactory participant for failing to attend or complete the entire period of AT (AR 135-91, para 4-13).

b. Is discharged or separated from the Selected Reserve except—

(1) To accept appointment as a commissioned officer or warrant officer as a Reserve of the Army with assignment to the Selected Reserve. Entitlement under the Sel Res MGIB will continue under the original NOBE.

(2) An officer who vacates his or her commission to enlist or reenlist with concurrent assignment to the Selected Reserve. Entitlement under the Sel Res MGIB will continue under the original NOBE.

(3) When separated because of a disability that occurred after the eligibility date and which is not the result of the soldier's own willful misconduct. In such a case entitlement to benefits will continue until expiration under e, below.

(4) When ordered to active duty without his or her consent during a period of war or national emergency (see para 8-12d).

(5) During the period 1 October 1991 and ending on 30 September 1999, a soldier who had received a NOBE (para 8-6) and is involuntarily separated from the Selected Reserve retains entitlement to benefits under the Sel Res MGIB until expiration under e, below. For the purpose of this paragraph, involuntarily separated refers to the separation of a soldier from a paid position in the Selected Reserve, to include an Individual Mobilization Augmentee(IMA) position, by reason of disability (not due to the soldier's own willful misconduct) incurred on or after the date of entitlement to educational assistance, unit inactivation, or redesignation of the Selected Reserve under the provisions of 10 USC 10143(b). A soldier will not be considered to be involuntarily separated if discharge, transferred, or reassigned from the Selected Reserve as a result of one or more of the following reasons:

- (a) At his or her own request unless for early retirement (15-year letter).
 - (b) As a result of unsatisfactory participation, or unsatisfactory performance, or under other adverse conditions including a transfer with a tentative characterization of under other than honorable conditions.
 - (c) Failure to meet qualifications for membership in the Selected Reserve under law or regulations, to include medical fitness standards.
 - (d) Immediately eligible for retired pay under any provision of law based on military service.
 - (e) Immediately eligible for an unreduced annuity under the Civil Service Retirement and Disability System or the Federal Employees Retirement System if serving as a military technician.
 - (f) Eligible for separation pay.
 - (g) Refusal to accept another position in the Selected Reserve (USAR or ARNGUS) which was offered to him or her within reasonable commuting distance (see consolidated glossary) or, if outside reasonable commuting distance, was located at or in close proximity to the location of the unit with which the soldier had been affiliated. Such position must not require a reduction in the soldier's grade, but may be in a different MOS, even if formal training in the new MOS is required.
 - (h) For the purpose of entry on extended active duty (see consolidated glossary) or for the purpose of immediate appointment or enlistment in a Regular component or another Reserve Component for continued service in the Selected Reserve.
 - (i) Soldier was not assigned, at the time of transfer or discharge, to an authorized position in the Selected Reserve which qualified him or her for basic pay or compensation for inactive duty training.
 - (j) Soldier was discharged on the expiration of his or her term of enlistment, unless he or she was fully qualified for reenlistment, requested reenlistment, but was not authorized to reenlist.
- c. Is serving on AD or FTNGD in an AGR status (see para 8-3d(2)).
 - d. Receives financial assistance under an ROTC Scholarship per 10 USC 2107.
 - e. Complets a 10-year period which began on the date the soldier became entitled to assistance under the Montgomery GI Bill except as provided for in paragraph 8-11.

8-11. Expiration of entitlement

A soldier's entitlement to unused benefits under the Sel Res MGIB will expire on the earlier of the following dates:

- a. At the end of a 10-year period of satisfactory service in the Selected Reserve beginning on the date that the soldier first became eligible for educational assistance based on the date specified in the NOBE; or
- b. On the date the soldier is separated from the Selected Reserve, except as provided in paragraph 8-10.
- c. Additional exceptions to a and b above are as follows:
 - (1) If a soldier is already enrolled in an educational institution when the period of entitlement expires, and
 - (a) The soldier is enrolled in an institution operated regularly on a quarter or semester basis and the period of entitlement will expire during a quarter or semester, if approved by the Department of Veterans Affairs, the benefit period will be extended to the end of that quarter or semester, or
 - (b) The soldier is enrolled in an institution not operated regularly on a quarter or semester basis and the period of entitlement will expire after a major portion of the course is completed, if approved by the Department of Veterans Affairs, the benefit period will be extended to the end of the course or for 12 weeks, whichever is earlier.
 - (2) If a soldier is prevented from pursuing an educational program under the Sel Res MGIB because of a physical or mental disability incurred in or aggravated by service in the Selected reserve (not the result of the soldier's own willful misconduct), and the soldier applies to the Department of Veterans Affairs for an extension of the 10-year period, within 1 year after the last day of the 10-year period, or the last day of the disability, whichever is later, in order to preserve eligibility, the 10-year period will not run for the period of the disability.

8-12. Reaffiliation in the Selected Reserve

- a. On reaffiliation, a soldier's entitlement to benefits will be adjusted by the amount previously awarded according to Department of Veterans Affairs regulations. The period of the Selected Reserve service required of a soldier who reaffiliates will be not less than the difference between the previous period of satisfactory Selected Reserve service performed and 6 years. The gaining unit will report the original eligibility date listed on DD Form 2384 or, DD Form 2384-1, from the soldier's official military records.

b. Only 1 “voluntary” release from the Selected Reserve may be permitted during the 10-year benefit period for the purpose of regaining eligibility to educational assistance benefits authorized in paragraph 8-7.

c. Following a period of satisfactory service, a soldier who is released from the Selected Reserve for a reason shown below may regain eligibility for educational assistance. This is provided reaffiliation in the Selected Reserve occurs within 1 year, except in cases involving a religious missionary obligation where the soldier has up to 3 years in which to reaffiliate.

(1) A voluntary separation or reassignment authorized by appropriate regulations. (See b above.)

(2) An involuntary separation or reassignment prescribed by appropriate regulations, but not provided for under paragraph 8-10b(5). This is provided the soldier’s service was characterized as honorable and the separation or reassignment was not based on the soldier’s performance, conduct, or for reasons of national security.

d. When a soldier is ordered to active duty without his or her content during a period of war or national emergency and loses Selected reserve status as a result, reaffiliation within 90 days of release from such period of active duty will allow the soldier to regain eligibility for educational assistance under this chapter. Selected Reserve soldiers who are ordered to active duty pursuant to Presidential Selected Reserve call-up (10 USC 12304), or under other circumstances not requiring their inclusion in the Active Army end strength, do not lose their status as members of the Selected Reserve during the period of such active duty, unless otherwise transferred from the Selected Reserve.

e. A soldier who terminated eligibility for educational assistance upon entry on AGR status (para 8-10c) may regain such eligibility on release from AGR status and reaffiliation with a Selected Reserve unit or the IMA program, under a above. This is provided the soldier has not gained entitlement to other government sponsored educational assistance programs by virtue of the service on AGR status.

8-13. Recoupment

Soldiers who receive educational assistance payments and lose entitlement due to unsatisfactory participation, may be required to refund part of the educational assistance received plus accrued interest. The recoupment will be according to the formula prescribed in instructions published by the Department of Defense and the Department of Veterans Affairs.

8-14. SRIP and the Montgomery GI Bill

a. A soldier entitled to benefits under the Sel Res MGIB may also be eligible to participate in the following incentives:

(1) Enlistment bonuses (chap 2 or chap 2.1).

(2) Reenlistment/extension bonus (chap 4).

(3) Affiliation bonus (chap 5).

(4) Student Loan Repayment Program (SLRP) (chap 5.1).

b. Soldiers must meet the eligibility requirements of the incentive and the Sel Res MGIB to qualify for both.

c. Particular attention must be paid to soldiers who may qualify for the reenlistment/extension bonus. Paragraph 4-4 specifies the soldier must execute an immediate reenlistment or extension agreement when within 3 months before or 24 hours after the soldier’s current ETS. Applicants for Sel Res MGIB entitlement should be counseled on the loss of eligibility for the reenlistment bonus if reenlistment or extension is not within 3 months of ETS. No guarantee can be made by an official that a reenlistment bonus will be authorized a soldier at current ETS. However, the soldier should be advised of the possible consequences of reenlisting or extending before normal ETS to qualify for the Sel Res MGIB.

Chapter 9

Basic Educational Assistance Entitlement for Service in the Selected Reserve (Short Title: Montgomery GI Bill 2 X 4 Program)

9-1. General

a. Basic educational Assistance Entitlement for Service in the Selected Reserve (Short Title: MGIB 2x4 Program) is provided under The All-Volunteer Force Educational Assistance Program as codified in 38 USC 30, prescribed by directives issued by the Secretary of Defense, and administrated by the Secretary of Veterans’ Affairs who determines eligibility for entitlement. The MGIB 2x4 Program offers basic educational assistance for a combination of service on active duty and service in the Selected Reserve.

b. The active duty service requirement for initial entitlement under the MGIB 2x4 Program is prescribed by AR 621-202. This chapter provides guidance and procedures for administering to the Selected Reserve service requirements for entitlement to basic educational assistance.

9-2. Scope

a. On completion of 2 years honorable service on active duty, a soldier who is entitled to reduced educational assistance under the MGIB 2x4 Program may earn basic educational assistance by satisfactory service in the Selected Reserve of the U.S. Armed Forces. Active duty for entitlement under this chapter is defined as full-time duty—

- (1) In the Active military service of United States (10 USC 101(d)(1); or
- (2) In an Active Guard Reserve (AGR) status (10 USC 12301(d); or
- (3) After 29 Nov 1989, in an ARNGUS AGR status (full-time National Guard duty (FTNGD))(32 USC 502(f)).

b. This chapter provides eligibility and participation requirements for entitlement to basic educational assistance benefits by service in the Selected Reserve of the U.S. Army. The Selected Reserve of the U.S. Army consists of soldiers—

- (1) Assigned to units of the ARNGUS.
- (2) Assigned to TPU's of the USAR.
- (3) Serving on active duty (10 USC 12301(d) or FTNGD (32 USC 502f)) in an Active Guard Reserve (AGR) status.
- (4) Assigned as individual mobilization augmentees (IMAs).

9-3. Basic educational assistance benefits

a. The Department of Veterans Affairs will provide educational assistance under the Sel Res MGIB to an eligible soldier pursuing a program of education approved by the Department of Veterans Affairs. A program of educational includes undergraduate, vocational, technical, flight training, graduate, and post graduate courses.

b. Eligible soldiers are entitled to basic educational assistance to pursue a program of education at a rate determined by the Department of Veterans Affairs and announced by a HQDA memorandum on an annual basis. The maximum benefit period is 36 months based on full-time status, or 48 months based on 3/4-time status, or 72 months based on 1/2-time status, or the number of months determined by the Department of Veterans Affairs based on less than 1/2-time status.

c. Under policy prescribed by AR 621-202, a soldier can earn entitlement to less than the full amount of basic educational assistance on completing 2 years of honorable service on active duty or FTNGD (para 9-2a).

d. If otherwise eligible, a soldier who has gained entitlement to less than the full amount of basic educational assistance, may gain entitlement to full basic educational assistance benefits by satisfactorily participating as a Selected Reserve soldier for 48 months.

e. A soldier's entitlement to educational assistance under the Army College Fund will not deny entitlement to the basic educational assistance under the MGIB 2 X 4 Program specified in d above.

f. *(Rescinded).*

9-4. Ensuring a soldier's awareness of basic educational assistance for Selected Reserve service under the MGIB 2x4 Program

a. To ensure that a soldier is aware of the benefits that can be earned by Selected Reserve service, each soldier entitled to less than the full basic amount of educational assistance being processed for separation from the Active Army, or being processed for release from AGR status per paragraphs 10-6c(2) and 10-6d(2) will complete DA Form 5642-R (Statement of Understanding and Selected Reserve Service Agreement Basic Educational Assistance Entitlement for Service in the Selected Reserve), Part One, Statement of Understanding. This is provided the soldier is within 90 days of completing 24 months of an initial 2-year active duty obligation except for an AGR soldier. Since AGR soldiers incur an initial 3-year active duty obligation, the soldier must complete at least 24 months (exactly) of active duty. The signed and witnessed Statement of Understanding will be filed as a permanent document in the soldier's official military personnel file (OMPF). A copy will be given to the soldier.

b. If a soldier subsequently signs DA Form 5642-R, Part Two (Selected Reserve Service Agreement) according to paragraph 9-5c, a copy will also be filed in the soldier's military personnel records jacket. (A reproduction master copy of DA Form 5642-R is at the end of this volume and will be locally reproduced on 8 1/2- by 11-inch paper.)

9-5. Entitlement to basic educational assistance

a. To earn entitlement to full basic educational assistance, a soldier must—

(1) Have established entitlement to less than full basic educational assistance per AR 621-202, or is an AGR soldier being released from active duty for the convenience of the Government per paragraphs 10-6c and 10-6d(2).

(2) Have completed one of the following:

(a) An initial obligated period of 24 months active duty (para 9-2a, or was authorized an early release of not more than 30 days from the initial active duty obligation.

(b) At least 24 months (exactly) of active duty in an AGR status and is being released for the convenience of the Government per paragraphs 10-6c and 10-6d(2).

(3) Have been released from active duty (REFRAD) or discharged with an honorable character of service.

- (4) Agree to serve in the Selected Reserve for at least 4 years by signing DA Form 5642-R, Part Two, Selected Reserve Service Agreement (para 9-4b).
- (5) Be eligible for assignment, appointment, or enlistment in the ARNGUS or USAR (para 9-7).
- (6) Be assigned to the Selected Reserve on REFRAD or discharge, or within 12 months following REFRAD or discharge (para 9-6).
- b. A soldier is entitled to full basic educational assistance after completing 48 continuous months of satisfactory Selected Reserve service (note para 9-5e) and is—
- (1) Honorably discharged.
 - (2) Placed on the Retired list.
 - (3) Transferred to the Individual Ready Reserve (IRR), Standby, or Retired Reserve.
 - (4) Voluntarily ordered to extended active duty in the Active Army per AR 135-210.
 - (5) Retained in the Selected Reserve for continued service.
- c. The requirement to complete 48 continuous months of Selected Reserve service to qualify for full basic educational assistance does not apply to a soldier who is discharged or transferred from the Selected Reserve for—
- (1) A service-connected disability.
 - (2) Hardship.
 - (3) For the convenience of the Government. This is provided the soldier has completed at least 30 months of Selected Reserve service. However, the period of service on active duty in an AGR status will not be computed as part of the required 30 months of Selected Reserve service for an AGR soldier released from active duty per paragraphs 10-6c and 10-6d(2).
 - (4) A medical condition which preexisted the soldier's becoming a member of the Selected Reserve and which the Secretary of the Army, in consultation with the Department of Veterans Affairs, determines is not service-connected.
 - (5) The convenience of the Government involuntarily as a result of a reduction in force as determined by the Secretary of the Army. During the period 1 October 1991 and ending on 30 September 1999, a soldier who is involuntarily separated from the Selected Reserve retains entitlement to basic educational assistance benefits under the MGIB 2x4 Program until expiration under paragraph 9-9. For the purpose of this paragraph, involuntarily separated refers to the separation of a soldier from a paid position in the Selected Reserve, to include an Individual Mobilization Augmentee (IMA) position, by reason of unit inactivation, or redesignation of the Selected Reserve under the provisions of 10 USC 10143(b). A soldier will not be considered to be involuntarily separated if discharged, transferred, or reassigned from the Selected Reserve as a result of one or more of the following reasons, in which case the Department of Veterans Affairs will determine the amount of educational assistance entitlement:
 - (a) At his or her own request unless for early retirement (15-year letter).
 - (b) As a result of unsatisfactory participation, or unsatisfactory performance, or under other adverse conditions including a transfer with a tentative characterization of under other than honorable conditions.
 - (c) Failure to meet qualifications for membership in the Selected Reserve under law or regulations, to include medical fitness standards.
 - (d) Immediately eligible for retired pay under any provision of law based on military service.
 - (e) Immediately eligible for an unreduced annuity under the Civil Service Retirement and Disability System or the Federal Employees Retirement System if serving as a military technician.
 - (f) Eligible for separation pay.
 - (g) Refusal to accept another position in the Selected Reserve (USAR or ARNGUS) which was offered to him or her within reasonable commuting distance (see consolidated glossary) or, if outside reasonable commuting distance, was located in close proximity to the location of the unit with which the soldier had been affiliated. Such position must not require a reduction in the soldier's grade, but may be in a different MOS, even if formal training in the new MOS is required.
 - (h) For the purpose of entry on extended active duty (see consolidated glossary) or for the purpose of immediate appointment or enlistment in a Regular component or another Reserve Component for continued service in the Selected Reserve.
 - (i) Soldier was not assigned, at the time of transfer or discharge, to an authorized position in the Selected Reserve which qualified him or her for basic pay or compensation for inactive duty training.
 - (j) Soldier was discharged on the expiration of his or her term of enlistment, unless he or she was fully qualified for reenlistment, requested reenlistment, but was not authorized to reenlist.
- (6) A physical or mental condition that was not characterized as a disability and did not result from the soldier's own misconduct, but did interfere with the soldier's performance of duty.
- d. The continuity of Selected Reserve service will not be considered to be broken when, for a period not to exceed 12 months, a soldier is not assigned to the Selected Reserve due to—
- (1) (*Rescinded.*)
 - (2) (*Rescinded.*)
 - (3) Release from Active Guard Reserve status pending assignment to another Selected Reserve assignment category.

(4) Cogent personal reasons based on hardship or employment that have been verified and transfer to the IRR or Inactive National Guard (ING) has been approved. If the period in the IRR or ING exceeds 12 months, the soldier will be terminated from entitlement to full basic educational assistance and the amount of assistance will be determined by the Department of Veterans Affairs.

e. A soldier may enroll for and receive benefits at the basic educational assistance rate determined by the Department of Veterans Affairs at any time after executing the agreement (para 9-5a(4)) to serve in the Selected Reserve.

9-5.1. Prohibition against duplication of educational assistance benefits

a. A soldier who has been determined by the Department of Veterans Affairs to be entitled to educational assistance under the MGIB 2x4 Program, but who is also eligible for educational assistance under a program listed below, may not receive assistance from both at the same time. In a manner prescribed by the Department of Veterans Affairs, the person will elect under which program he or she will receive educational assistance.

(1) Vocational Rehabilitation (38 USC chap 31).

(2) Post-Vietnam Era Veterans Educational Assistance (VEAP) (38 USC chap 32).

(3) Veterans Educational Assistance (Vietnam Era GI Bill) (38 USC chap 34). A soldier entitled to educational assistance under the Vietnam Era GI Bill may not receive assistance under the Montgomery GI Bill (see para 10-11) before 1 January 1990.

(4) Educational Assistance Program for Members of the Selected Reserve (Montgomery GI Bill) (10 USC chap 1606) (see chap 8 of this regulation).

(5) Educational Assistance for Persons Enlisting for Active Duty (DOD FY 81 Educational Assistance Test Program) (10 USC chap 107).

(6) Student Loan Repayment Program (see chap 5.1) or Health Professionals Loan Repayment Program (see chap 7). The law provides that a period of service counted for purposes of loan repayment of an educational loan may not also be counted for purposes of entitlement to educational assistance under the MGIB 2x4 Program.

b. There is a limitation of 48 months of benefits under any combination of Department of Veterans Affairs administrated education benefit programs.

9-6. Membership in the Selected Reserve

To participate in the Montgomery GI Bill 2 X 4 Program, an applicant must be assigned to the Selected Reserve within the 12 months following REFRAD or discharge from the Active Army or corresponding service in another armed force, or active duty in an AGR status. Selected Reserve service consists of assignment to a unit of the ARNGUS, a TPU of the USAR, an IMA position, or service in an Active Guard Reserve status, or any combination of such assignments with continuous service.

a. Selected Reserve assignment cannot be guaranteed to any applicant. Assignment is predicated on the availability of a position vacancy in the ARNGUS or USAR within a reasonable distance of the applicant's residence.

b. A Selected Reserve assignment requires eligibility for ARNGUS appointment or enlistment and, unless a soldier has been transferred to satisfy a remaining statutory or contractual military service obligation, eligibility for appointment, enlistment, or reenlistment in the USAR.

9-7. Procedures for Selected Reserve assignment

The procedures for Selected Reserve assignment are determined by the applicant's military category at the time of such application. An applicant who has signed a Selected Reserve Service Agreement (DA Form 5642-R, Part Two) and is otherwise eligible, who is—

a. Being processed for *REFRAD from the Active Army, or active duty in an AGR status* with a remaining statutory or contractual military service obligation, and who applies for—

(1) *ARNGUS membership*. The applicant must—

(a) Be appointed commissioned or warrant officer of the ARNGUS with Federal recognition per NGR 600-100; or

(b) Enlist in the ARNGUS per NGR 600-200.

(2) *USAR, TPU, or IMA assignment*. If a position is available—

(a) An officer or warrant officer will be assigned to the position by a Total Army Career Counselor (TACC) per AR 140-10. The TACC must notify CG, ARPERCEN (DARP-OP) of the assignment.

(b) The enlisted soldier will be assigned to the position by a TACC per AR 140-10.

b. Being processed for honorable *discharge from the Regular Army*, and who applies for—

(1) *ARNGUS membership*. The applicant must be appointed or enlisted in the ARNGUS as described in a(1) above.

(2) *USAR membership with assignment to a TPU or IMA position*. If a position is available, the applicant must—

(a) Be appointed a commissioned officer or warrant officer in the USAR per AR 135-100. Assignment to a TPU or IMA position will be made by CG, ARPERCEN (DARP-OP) per AR 140-10.

(b) Enlist in the USAR as a prior service applicant with concurrent assignment to a TPU or IMA position. This process will be accomplished by a TACC per AR 601-210.

c. Currently assigned to the Individual Ready Reserve (IRR) and requests reassignment to the Selected Reserve. To participate in the MGIB 2 X 4 Program, a soldier who completed an initial 2-year active duty obligation with entitlement to reduced educational assistance per AR 621-202, and was REFRAD or discharged from the Active Army, or corresponding service in another armed force of the United States, during the preceding 12 months, may apply for participation. Also, a soldier who was released from active duty in an AGR status per paragraphs 10-6c and 10-6d(2) may apply for participation. If the applicant applies for—

(1) *Transfer to the ARNGUS*. The applicant must be appointed or enlisted in the ARNGUS as described in (1) above.

(2) *Reassignment to a USAR TPU or IMA assignment*. If a position is available—

(a) CG, ARPERCEN (DARP-OP) will reassign the commissioned or warrant officer per AR 140-10.

(b) Recruiting officials of the U.S. Army Recruiting Command (USAREC) will process the enlisted soldier per AR 140-10.

9-8. Continuing eligibility on transfer from another Reserve Component

When a member of the Selected Reserve of a Reserve Component, who is earning entitlement to increased benefits under the Montgomery GI Bill 2 X 4 Program, transfers to the Selected Reserve of the ARNGUS or USAR, he or she will continue to earn entitlement. The service performed in the Selected Reserve of the Reserve Component, except for that portion served on active duty in an AGR status prior to the REFRAD described in paragraph 9-6, will be credited toward the completion of the required 48 months of Selected Reserve service (para 9-5f).

9-9. Expiration of entitlement to increased educational assistance benefits

Entitlement to increased benefits earned by Selected Reserve participation under the Montgomery GI Bill 2 X 4 Program will expire 10 years after the last day on which—

a. The soldier completed the 48 months of Selected Reserve service per paragraph 9-5b; or

b. The date the soldier is discharged or released from Selected Reserve service per paragraph 9-5c.

9-10. Termination of eligibility for increased educational assistance

Except for separations authorized in paragraphs 9-5b and c, eligibility for full educational assistance benefits will terminate on separation from the Selected Reserve for any reason before completion of the required 48 months. However, the soldier who gained entitlement to less than full basic educational assistance will still retain his or her entitlement at a rate determined by the Department of Veterans Affairs. This entitlement will expire 10 years after the date of the soldier's discharge or REFRAD from the period of active duty wherein he or she earned the entitlement.

9-11. Reporting requirements

a. Eligibility status for the basic educational assistance benefit is reported by the Active Army to the Defense Manpower Center (DMDC) when the soldier is separated from an Active Army.

b. DMDC will periodically match the ARNGUS and USAR Selected Reserve Master File against the VA Benefit Master File for 38 USC Chapter 30 (Montgomery GI Bill 2 x 4 Program) participants to validate eligibility status for soldiers who obligate 4 or more years in the Selected Reserve.

9-12. Responsibilities of State Education Services Officer and ARCOM/GOCOM GI Bill Manager

State Education Services officers ARCOM/GOCOM GI Bill managers are the managers of the Montgomery GI Bill programs on behalf of their respective commands. They will provide guidance and assistance according to publish policy and procedures and coordinate personnel actions or functions required for support of the Montgomery GI Bill.

Chapter 10

Basic Educational Assistance Entitlement for Service on Active Duty in an Active Guard Reserve (AGR) Status (Montgomery GI Bill)

10-1. General

a. This entitlement is codified in Title 38, U.S. Code, chapter 30 (All-Volunteer Force Educational Assistance Program) and is administered by the Secretary of Veterans' Affairs who determines eligibility for entitlement. This chapter provides the U.S. Army with guidance and procedures necessary to support the educational assistance program in compliance with Department of Veterans' Affairs directives.

b. Congress enacted the Montgomery GI Bill to—

(1) Assist in the readjustment of members of the U.S. Armed Forces to civilian life after their separation from military service.

(2) Promote and assist the All-Volunteer Force Program and the Total Force concept of the U.S. Armed Forces by establishing a new program of educational assistance. The assistance is based on active duty (AD) service or a

combination of service on AD and in the Selected Reserve. This will aid in the recruitment and retention of highly qualified personnel for the U.S. Armed Forces.

c. Basic educational assistance entitlement for Active Army soldiers and the Army College Fund (ACF) for Regular Army service is prescribed by AR 621–202.

10–2. Scope

The basic educational assistance program—

a. Requires eligible commissioned officers, warrant officers, and enlisted soldiers to be enrolled under the Montgomery GI Bill and their pay reduced \$100 a month for 12 months, unless they decline enrollment. After enrollment, these soldiers may gain entitlement to basic educational assistance benefits for 36 months of educational programs approved by the Department of Veterans Affairs.

b. Provides for conversion from the Vietnam Era GI Bill (38 USC chap 34) to the educational assistance benefits of the Montgomery GI Bill on 1 January 1990, under certain circumstances.

10–3. Active duty service

Active duty service is the key factor in determining eligibility for enrollment and entitlement under the Montgomery GI Bill. Although the final determination for entitlement to educational assistance benefits rests with the Secretary of Veterans Affairs. The following definitions provide guidance for determining AD service:

a. AD is 1 or more days of service on—

(1) Full-time duty in the active military service of the of a U.S. (10 USC 101(d)(1)). However, for the purpose of this chapter, it does not include a period assigned full-time to a civilian institution for a course of education or service as a cadet or midshipman at one of the service academies.

(2) Full-time AD in an AGR status. All USAR AGR soldiers, and ARNGUS soldiers ordered to an AGR tour under 10 USC 12301(d), serve on full-time AD. For the purpose of this chapter, the term AD also includes full-time National Guard duty (FTNGD) first performed after 29 Nov 1989 by an ARNGUS soldier ordered to an AGR tour under title 32, U.S. Code.

(3) AD for special work (ADSW) (AR 135–200).

(4) Temporary tour of AD (TTAD) (AR 135–210).

(5) AD support (ADS) (ADS tours were not authorized after FY 82).

b. The following categories of service are not AD service for the purpose of entitlement under the Montgomery GI Bill:

(1) Initial active duty for training (IADT), active duty for training (ADT), or special active duty for training (SADT), per AR 135–200.

(2) Annual training (AT).

(3) Full-time duty (FTD), full-time training duty (FTTD), or full-time National Guard duty (FTNGD), under title 32, U.S. Code performed prior to 30 Nov 89.

c. For the purpose of this chapter, any period of service described below will not be considered a part of a soldier's initial obligated period of active duty.

(1) Any period terminated because of a defective enlistment based on:

(a) The individual being a minor for purposes of service in the Armed Forces; or

(a) An erroneous enlistment; or

(b) A defective enlistment agreement.

(2) Any period of service on active duty which a Selected Reserve soldier was ordered to perform under 10 USC 12301, 12302, 12304, 12306, or 12307 for a period of less than 2 years.

10–4. Enrollment

ARNGUS and USAR commissioned officers, warrant officers, and enlisted soldiers will be enrolled under the Montgomery GI Bill if they meet all of the following conditions:

a. Entered on AD in an AGR status on or after 1 July 1985 with an initial obligation to serve on AD for at least 3 years. All initial tours of AD in the AGR program are for 3 years per AR 135–18, paragraph 2–9.

b. The entry on AGR status is the soldier's initial obligated period of active duty (see para 10–3c).

c. The soldier has not—

(1) Received a commission in the U.S. Armed Forces based on graduation from a service academy; or

(2) Received a commission as a result of completing a program of educational assistance (scholarship) in the Reserve Officers Training Corps (ROTC).

10–5. Requirements for gaining entitlement to benefits

A soldier enrolled under the Montgomery GI Bill per paragraph 10–4 is entitled to basic educational assistance when he or she meets all of the following requirements:

- a. Completes 2 years of the initial AD obligation and—
 - (1) Continues on AD; or
 - (2) Receives an honorable discharge; or
 - (3) Is released from AD (REFRAD) with an honorable character of service.
- b. Receives a high school diploma or equivalency certificate before completion of the initial AD obligation. The equivalency certificate must be a credential that has been awarded based on the successful completion of any of the following:
 - (1) General Education Degree (GED) certificate.
 - (2) High school diploma based on GED.
 - (3) Correspondence school.
 - (4) California High School Proficiency Examination (CHSPE).
 - (5) High school attendance certificate.
 - (6) High school completion certificate.
 - (7) Adult education certificate or diploma.
 - (8) “External” or competency based diploma.
 - (9) The equivalent of 12 semester hours in a program of education leading to a standard college degree.

10-6. Exceptions

The following are authorized exceptions to the requirement for completion of the AD obligation (paras 10-5a and 10-11c(4)) to retain eligibility. A soldier who meets the educational requirement (para 10-5b) and is honorably discharged or REFRAD with an honorable character of service for—

- a. A service connected disability or hardship is entitled to 1 month of benefits for each month served on AD.
- b. A medical condition that preexisted the AD service, retains eligibility for benefits.
- c. The convenience of the Government as a result of a reduction in force as determined by the Secretary of the Army, does not have to serve a minimum number of months to retain eligibility.
- d. The convenience of the Government (not as a result of a reduction in force) after serving in (1) or (2) below, as appropriate.
 - (1) At least 30 months of the 3-year AD obligation, is eligible for 36 months of benefits.
 - (2) At least 24 months (exactly), but less than 30 months, of the 3-year AD obligation, can gain entitlement to 36 months of benefits. This can only be done by participation in the Montgomery GI Bill 2 X 4 Program per chapter 9 of this regulation.

10-7. Basic educational assistance benefits

The monthly rate of basic educational assistance that is available to an eligible soldier is determined by the Department of Veterans Affairs and announced by a HQDA memorandum on an annual basis. When the Department of Veterans Affairs has determined eligibility for entitlement to benefits under the Montgomery GI Bill—

- a. The Department of Veterans Affairs will pay a basic educational assistance allowance at the monthly rate for an approved program of education pursued on a full-time basis.
- b. The Department of Veterans Affairs will pay a basic educational assistance allowance at an appropriate reduced rate as determined under regulations which the Department of Veterans Affairs will prescribe for an approved program of education pursued on less than a full-time basis.
- c. If a soldier is pursuing a program of Department of Veterans Affairs approved education while serving on AD, or on less than half-time basis, the amount of assistance will be the lesser of—
 - (1) The amount payable to the soldier under this program; or
 - (2) The established charges for tuition and fees the institution requires from nonveterans who are enrolled in the same program.

10-8. Prohibition against duplication of benefits

a. A person who has been determined by the Department of Veterans Affairs to be entitled to educational assistance under the Montgomery GI Bill, but who is also eligible for educational assistance under a program listed below, may not receive assistance from both at the same time. In a manner prescribed by the Department of Veterans Affairs, the person will elect under which program he or she will receive educational assistance.

- (1) Vocational Rehabilitation (38 USC chap 31).
- (2) Post-Vietnam Era Veterans Educational Assistance (VEAP) (38 USC chap 32).
- (3) Veterans Educational Assistance (Vietnam Era GI Bill) (38 USC chap 34). A soldier entitled to educational assistance under the Vietnam Era GI Bill may not receive assistance under the Montgomery GI Bill (see para 10-11) before 1 January 1990.
- (4) Educational Assistance Program for Members of the Selected Reserve (Montgomery GI Bill) (10 USC chap 1606) (see chap 8 of this regulation).

(5) Educational Assistance for Persons Enlisting for Active Duty (DOD FY 81 Educational Assistance Test Program) (10 USC chap 107).

(6) Student Loan Repayment Program (see chap 5.1) or Health Professionals Loan Repayment Program (see chap 7). The law provides that a period of service counted for purposes of loan repayment of an educational loan may not also be counted for purposes of entitlement to educational assistance under the Montgomery GI Bill for AD service.

b. There is a limitation of 48 months of benefits under any combination of Department of Veterans Affairs administered education benefit programs.

10-9. Expiration of entitlements

a. Entitlement to basic educational assistance under the Montgomery GI Bill as described in this chapter, expires at the end of a 10-year period beginning on the date of the soldier's last discharge or release from a period of AD of 90 days or more. The release or discharge is from continuous AD that commenced with the initial 3-year order to AD.

b. Adjustments or extensions of the 10-year period may be determined by the Department of Veterans Affairs as provided in law.

10-10. Educational assistance while serving on AGR status

a. When approved by the Department of Veterans Affairs, a soldier may receive educational assistance under the Montgomery GI Bill while serving on AGR status. This is provided the soldier meets all of the following conditions:

- (1) Has completed at least 2 years of the initial 3-year AD obligation without a break in the AD service.
- (2) Has met the educational requirement of paragraph 10-5*b*.
- (3) Is enrolled in a Department of Veterans Affairs approved program of education.
- (4) Is not receiving assistance under the programs cited in paragraph 10-8*a*.

b. The amount of educational assistance that will be provided will be determined by the Department of Veterans Affairs (see para 10-7*c*).

10-11. Conversion of Veterans Educational Assistance (Vietnam Era GI Bill) entitlements

a. Soldiers entitled to benefits under Veterans Educational Assistance (Vietnam Era GI Bill) are entitled to receive benefits under the Montgomery GI Bill, plus half of the benefits remaining under the Vietnam Era GI Bill on 31 December 1989, under the conditions cited *inc* below. These combined benefits became available on 1 January 1990 and are payable for 36 months or the number of months remaining of Vietnam Era GI Bill entitlement as of 31 December 1989, whichever is less.

b. Conversion of benefits from the Vietnam Era GI Bill to the Montgomery GI Bill as described in *a* above, will be accomplished for soldiers who meet the criteria outlined *inc* below. The conversion is automatic without any reduction in pay.

c. Conversion is authorized for a soldier who—

- (1) Was eligible for educational assistance under the Vietnam Era GI Bill as of 31 December 1989; and
- (2) Was on AD on 19 October 1984; and
- (3) After 19 October 1984 served on AD without a break in service; and
- (4) After 30 June 1985, met the educational requirement of paragraph 10-5*b* and:
 - (*a*) Has served at least 3 years on AD without a break in service; or
 - (*b*) Has served at least 2 years on AD without a break in service and contracted to serve 4 years in the Selected Reserve under chapter 9 of this regulation; or
- (*c*) Is honorably discharged or REFRAD under the exceptions cited in paragraph 10-6.

10-12. Pay reduction

a. A soldier converting from the Vietnam Era GI Bill to the Montgomery GI Bill (para 10-11) does not have to have a reduction in pay.

b. Upon reporting for initial entry on AD as described in paragraph 10-4—

(1) Each soldier is offered an opportunity to decline enrollment at that time, unless the soldier completes and signs DD Form 2366 (Veterans Educational Assistance Act of 1984)(GI Bill), block 4, declining enrollment, the soldier is automatically enrolled, pay reduction commences, and his or her pay will be reduced by \$100 a month for 12 months.

(2) The decision to enroll or decline enrollment must be made at the time of processing and cannot be changed or revoked at a later date. Since it is a reduction in pay and not a contribution, it is not refundable.

10-13. Processing soldiers entering on AGR status

a. During in-processing, the appropriate servicing command, personnel services command or center (PSC), or personnel services support team (PSST), will make a preliminary determination of the soldier's eligibility for enrollment (para 10-4) and ensure that counseling on the Montgomery GI Bill is available. Only the can make a final determination of eligibility.

b. Counseling, completion and submission of a DD Form 2366 will be completed in person with the witnessing official *during the first 3 days of AD* as part of in-processing. The form must be completed, signed, and witnessed before the soldier is accessed to the JUMPS–Army pay system.

c. Regardless of a soldier's eligibility for enrollment (para 10–4), each soldier entering on AD in an AGR status must complete and sign a DD Form 2366 during in-processing. To prevent any reduction in pay (para 10–12a), a soldier in any of the following categories must complete and sign DD Form 2366, block 4:

- (1) Not eligible for enrollment per paragraph 10–4.
- (2) Eligible for enrollment but elects to decline enrollment.

10–14. DD Form 2366 instructions

a. The form will be completed in person with the witnessing official. If the soldier is—

(1) Eligible for enrollment (para 10–4) and elects to remain enrolled then blocks 1, 2, and 3 will be completed, signed, and witnessed. Once enrolled, the soldier cannot later disenroll.

(2) Eligible for enrollment (para 10–4) and elects to decline enrollment, then blocks 1, 2, and 4 will be completed, signed, and witnessed. Once disenrolled, the soldier cannot later enroll.

(3) Not eligible for enrollment (para 10–4c), blocks 2 and 3 will be crossed out and blocks 1 and 4 will be completed, signed, and witnessed.

b. Block 5 of the form will contain the following statement: “I am not eligible for the Army College Fund. I am not entitled to benefits under the Montgomery GI Bill for periods in which I participated in the Student Loan Repayment Program or the Health Professionals Loan Repayment Program.”

c. The completed form will be distributed as follows:

(1) If the soldier was not eligible for enrollment (see a(3) above), give the original to the servicing finance office when the soldier is accessed to JUMPS–Army and give the soldier a copy.

(2) If the soldier is eligible for enrollment, even if he or she declined enrollment —

(a) Send the original to Commander, U.S. Army Reserve Personnel Center, ATTN: DARP–PRD–M, 9700 Page Boulevard, St. Louis, MO 63132–5200, for inclusion in the soldier's official military personnel file (OMPF).

(b) Present a copy, with a copy of the order to AGR status attached, to the servicing finance office when the soldier is accessed to JUMPS–Army.

(c) Give a copy to the soldier.

Chapter 11

New Specialized Training Assistance Program for Medical Corps and Army Nurse Corps Officers (Short Title: New STRAP)

11–1. General

a. This chapter prescribes policy and procedures governing the New STRAP for Medical Corps (MC) and Army Nurse Corps (AN) officers of the Army National Guard of the United States (ARNGUS) and the U.S. Army Reserve (USAR). This program is authorized under 10 USC 16201.

b. This chapter does not implement the portions of 10 USC 16201 that pertain to baccalaureate training for nursing students who are not immediately eligible for appointment as Reserve commissioned officers.

11–2. Scope

For the purpose of providing adequate numbers of commissioned officers who are qualified in health profession specialties critically needed in wartime, Congress authorized the Secretary of the Army to establish and maintain a program to provide financial assistance to persons training in such specialties. The New STRAP sets up financial assistance to officers engaged in specialized training in return for their service in the Ready Reserve.

11–3. Additional responsibilities

In addition to the responsibilities described in paragraph 1–5, the following additional responsibilities are necessary for the appropriate administration of the New STRAP.

a. The Surgeon General (TSG) will—

(1) Determine the categories of applicants to be considered and the number to be selected for entry into each discipline. This will be done within Department of Defense (DOD) limitations and the anticipated requirements of the Army Medical Department (AMEDD).

(2) Conduct AMEDD accession boards and the New STRAP Selection Board that will develop an order of merit list (OML) by discipline for the ARNGUS (by state) and for the USAR.

(3) Monitor and evaluate program effectiveness.

(4) Represent the Department of the Army (DA) in joint service aspects of the program.

(5) Serve as overall Program Manager. As a minimum, conduct quarterly review meetings during the first year of program implementation.

(6) Develop appropriate advertising for the USAR program in coordination with HQDA, ODCSPER, and with USAREC.

(7) Evaluate the effectiveness of the program as a recruitment incentive for the USAR.

(8) Appoint an official within the U.S. Army Health Support Agency (USAHPSA) to serve as the New STRAP Manager.

b. The Chief, National Guard Bureau (CNGB), will—

(1) Provide distribution quotas by state to the New STRAP Manager prior to the convening of each New STRAP selection board.

(2) Exchange program-related information with the Office of The Surgeon General (OTSG) and DFAS.

c. The Chief, Army Reserve (CAR) will—

(1) Develop management indicators to monitor program effectiveness.

(2) Exchange program-related information with the OTSG and DFAS.

d. CG, ARPERCEN will—

(1) Exchange program-related information through OCAR with OTSG and DFAS.

(2) Develop policy, procedures and management initiatives for IRR and IMA participants.

(3) Disseminate information to IRR and IMA officers.

(4) Initiate recoupment actions for IRR and IMA officers who fail to meet their New STRAP contractual obligation (para 11-13).

(5) Notify the New STRAP Manager (*f* below) of any initiation of recoupment action for officers who fail to meet their contractual obligation.

(6) Ensure that IRR officers who elect the Selected Reserve option are assigned to the Selected Reserve when their New STRAP benefits are terminated and their New STRAP obligation begins.

e. The DFAS will develop procedures for preparation and submission of information to initiate payment, termination, or recoupment of a stipend when warranted.

f. The New STRAP Manager is located at the U.S. Army Health Professional Support Agency, ATTN: SGPS-PDE, 5109 Leesburg Pike, Falls Church, VA 22041-3258. The New STRAP Manager will—

(1) Assist TSG in exercising the responsibilities outlined in paragraph 1-5 and in *a*(5) above.

(2) Approve service agreements on behalf of the Army under the New STRAP.

(3) Maintain data on the number of program participants by specialty, year of training completion, anticipated obligation, and the amount expended on the program.

(4) Notify the DFAS (DFAS-I-SAE-A) to begin and end payment of a stipend. The notification for ARNGUS participants will be sent through CNGB (NGB-ARP).

(5) Monitor accreditation of training programs.

(6) Control quotas.

(7) Initiate recoupment actions as required.

(8) Approve all requests for suspensions (para 11-8).

(9) Be responsible for—

(a) Application file maintenance.

(b) Semiannual training eligibility verification with the program directors of New STRAP participants.

(c) Coordinating stipend payments with DFAS.

(d) Operating and reporting procedures, requirements, and correspondence regarding the New STRAP.

g. Unit commanders will—

(1) Disseminate program information to all potential participants.

(2) Initiate recoupment actions when required (para 11-12).

(3) Notify the New STRAP Manager (*f* above) of any change in status that would affect a unit officer's eligibility to participate in the New STRAP (para 11-7).

(4) Notify the New STRAP Manager (*f* above) of any initiation of recoupment actions for officers who fail to meet their contractual obligation.

11-4. Eligibility

Effective 4 December 1987, to be eligible for this program, participants must meet all of the following requirements. The officer must—

a. Be a citizen of the United States.

b. Be a commissioned officer in the Ready Reserve, but not serving in an Active Guard Reserve (AGR) status.

c. Be designated or assigned for service in the MC and AN.

d. Be engaged in a course of training acceptable to HQDA (DASG-ZA).

- (1) The training must be in one of the following medical or nursing specialties:
 - (a) *Medical Corps* . Eligible specialties will be announced by HQDA (DAPE-MPO), as appropriate.
 - (b) **(Rescinded.)**
 - (c) **(Rescinded.)**
 - (d) 66E—(Operating Room Nurse).
 - (e) 66F—(Nurse Anesthetist).
 - (f) 66H—(Medical–Surgical Nurse).
- (2) Nursing courses include—
 - (a) Baccalaureate degree programs in nursing or nurse anesthesia. (Only registered nurses may receive a stipend for such training.)
 - (b) Master’s degree programs in nurse anesthesia, preoperative nursing, adult medical–surgical nursing, or adult critical care nursing.
 - (c) Approved programs of 6 weeks or longer in nurse anesthesia, preoperative nursing, or adult critical care nursing.
- (3) Baccalaureate and master’s degree programs must be acceptable to DA and accredited by an agency recognized by the U.S. Secretary of Education. Nurse anesthesia programs must be fully accredited by the Council on Accreditation of Nurse Anesthesia Educational Programs, American Association of Nurse Anesthetists.
- (4) AN officers pursuing baccalaureate or master’s degree programs must continuously earn at least 50 percent of the credit hours required for full-time student status at their educational institution.
- e. Execute DA Form 5685–R (New Specialized Training Assistance Program (New STRAP) Service Agreement) (see para 11–18).
- f. Remain assigned to the Ready Reserve while participating in the New STRAP. Subject to strength needs, each participant will have the option of continuing his or her current Reserve status (for example, IRR, TPU, IMA), except for retention in an AGR status.
- g. Be able to fulfill the service obligation incurred by New STRAP participation prior to mandatory removal from active status per AR 140–10, chapter 7, or NGR 635–100, paragraph 5.
- h. Not be in a promotion passover status. An officer who has failed at selection for promotion is not eligible for this program unless subsequently recommended for promotion.
- i. Be selected to participate in the program by the New STRAP Selection Board (para 11–17).
- j. Not be receiving financial assistance under an ROTC scholarship program (10 USC 2107).
- k. Not have an active duty service commitment in a uniformed service or a service commitment in the Public Health Service.

11–5. Financial assistance

- a. The amount of financial assistance an officer may receive while engaged in specialized training is determined by the service obligation for which the officer contracted on enrollment in the New STRAP (para 11–13) and the rate in effect for the fiscal year.
- b. The rate of assistance under the Armed Forces Health Professions Scholarship Program cited in DOD Military Pay and Entitlements Manual, part 8, chapter 5, is the basis for the amount of monthly stipend under the New STRAP. This rate is subject to annual increases on 1 July of each year as determined by the Secretary of Defense and published in the DOD Military Pay and Entitlements Manual.
- c. The monthly stipend is payable during the course of specialized training and during vacation periods. It is prorated for portions of a month at the beginning and end of the course of specialized training.
- d. An officer who agrees to fulfill the service obligation in—
 - (1) The IRR will be entitled to a monthly stipend at the rate of ½ that paid to officers participating in the Armed Forces Health Professions Scholarship Program (DOD Military Pay and Entitlements Manual, part 8, chap 5).
 - (2) The Selected Reserve, except for service on AGR status, will be entitled to a monthly stipend at the rate paid to officers participating in the Armed Forces Health Professions Scholarship Program (DOD Military Pay and Entitlements Manual, part 8, chap 5).
- e. Eligibility for payment of a stipend to an officer who has been selected to participate in the New STRAP begins on the latest of the following four dates:
 - (1) Enrollment or start date of training (whichever is later) in an approved specialized training program.
 - (2) Appointment as a commissioned officer designated or assigned for service in the MC or AN.
 - (3) Execution of DA Form 5685–R. (***A local reproduction master copy of DA Form 5685–R is located at the back of this volume and may be locally reproduced on 8½– by 11–inch paper.***) DA Form 5685–R will not be considered executed until signed by the New STRAP manager (para 11–3f).
 - (4) Assignment to the Ready Reserve (except for AGR status) (para 11–4g).
- f. Payment of the monthly stipend will cease on suspension or termination from the New STRAP, removal from active status, transfer from the Ready Reserve, or completion of the specialized training program, whichever is earlier.

11-6. Authorized number of participants

a. The number of participants who may be provided financial assistance at any one time will be contingent upon the level of funding available in any given fiscal year and Congressional and DOD guidance provided.

b. Participants in the New STRAP may not participate simultaneously in the Health Professionals Loan Repayment (HPLR) Program outlined in chapter 7. However, after completion of the specialized training (during obligated service) the officer may receive assistance under the HPLR Program if he or she meets the eligibility requirements and applies for loan repayment per chapter 7.

11-7. Participant responsibilities to maintain eligibility

a. To maintain New STRAP eligibility and continue to receive financial assistance the officer must—

(1) Comply with all academic, medical, administrative, and other standards and requirements outlined for the specialized training program. This includes compliance with applicable directives and instructions issued by HQDA, ODCSPER, NGB, OCAR, or other competent authority.

(2) Advise the New STRAP manager (para 11-3*f*), through the appropriate ARNGUS or USAR command or PMO, of any changes in status that may affect eligibility to continue to receive the stipend. This includes—

(*a*) Training program status.

(*b*) Academic standing.

(*c*) Health.

(*d*) Personal information such as marital status, address, and telephone number.

b. Participants are responsible for semiannual verification of program enrollment. On 1 July and 1 January of each year, participants must submit a verification of program participation letter to the dean of the academic institution or training program director at the end of each academic semester. (A sample verification letter is shown in fig 11-1.) The academic institution must forward the verification directly to the New STRAP manager (para 11-3*f*). Verification of attendance at the educational institution needs only to be made twice a year for institutions that conduct more than two semesters.

c. Payment of a stipend will be withheld pending an officer's compliance with *a* or *b* above when the officer's eligibility or status cannot be immediately determined.

11-8. Suspension of participation

a. Payment of a stipend is not authorized during a period of suspension.

b. At the discretion of TSG, or his or her designated representative, an officer's entitlement to a stipend and active participation in the New STRAP may be suspended, in lieu of termination, for a specified period of time. Participants in the New STRAP will be suspended from the program if the officer is—

(1) Screened from the Ready Reserve per AR 135-133 and assigned to the Standby Reserve. The suspension must not exceed 3 years.

(2) Placed under suspension of favorable personnel action per AR 600-8-2. The period of suspension may not exceed 1 year.

c. Except under extraordinary circumstances determined by TSG, only 1 suspension of participation may be granted or imposed.

d. Requests for suspension will be made to the New STRAP manager (para 11-3*f*) in writing with justification.

11-9. Reinstatement after a period of suspension

a. An officer who completes a period of suspension may request reinstatement of New STRAP participation and resumption of stipend payments. Requests for reinstatement will only be considered if the officer is otherwise eligible (para 11-4). The request should be sent through the appropriate ARNGUS or USAR command to the New STRAP Manager (para 11-3*f*).

b. Reinstatement in the New STRAP and resumption of stipend payments is made at the discretion of the TSG and cannot be guaranteed. Reinstatement depends on the availability of a quota for the specific discipline.

11-10. Termination

a. Participation in the New STRAP will terminate on successful completion of the specialized training program, if not terminated earlier as specified below.

b. Early termination of an officer's participation in the New STRAP must be directed or approved by HQDA (DAPE-MPO) acting on behalf of the Secretary of the Army. Such early termination may only be for 1 or more of the reasons cited in *c* or below.

c. Participation in the New STRAP may be terminated if an officer—

(1) Fails to complete a specialized training program and either—

(*a*) Is released from the training program; or

(*b*) Voluntarily stops training in the specialty designated in the participant's New STRAP agreement.

(2) Fails to meet or maintain the eligibility requirements for the New STRAP (para 11–4). These requirements include, but are not limited to—

- (a) Membership in good standing in the Ready Reserve.
- (b) Valid licenser, as required.
- (c) Attendance in good standing at the specialized course of training.

(3) Is convicted of any of the following:

- (a) A felony as defined under Federal, State, or local law.
- (b) An offense which if tried under the Uniform Code of Military Justice (UCMJ) could result in a sentence of at least 1 year of confinement or a dishonorable discharge.
- (c) An offense involving moral turpitude, including sexual offenses and acts involving dishonesty.

(4) Commits one or more acts resulting in discreditable involvement with civilian or military authorities (for example, public drunkenness). An officer may be terminated from the program whether or not the officer is charged, indicted, tried, or convicted of such acts.

(5) Becomes an unsatisfactory participant under the provisions of AR 135–91.

(6) Exceeds the maximum period authorized for suspension in paragraph 11–8.

(7) Applies for conscientious objector (1–0) status.

d. Additionally, participation may be terminated by HQDA (DAPE–MPO) acting on behalf of the Secretary of the Army, if such an action is in the best interest of the Government.

11–11. Participant requirements resulting from termination

a. A New STRAP participant who fails to complete the specialized training program and is terminated under paragraph 11–10 will be subject to one of the following:

(1) Recoupment (see para 11–12).

(2) Ordered to AD for a period of 1 year for each year or part thereof for which the officer received financial assistance. Time spent in graduate professional education while on AD will not be creditable toward satisfying the New STRAP requirement.

b. The Secretary of the Army may choose not to seek recoupment or AD service of an officer who fails to complete the specialized training program. However, such action will not relieve the officer from any military obligation imposed or incurred by any other law or regulation.

11–12. Recoupment

a. The Office of the Comptroller of the Army will issue specific collection procedures for the recoupment of stipend payment. The New STRAP manager will initiate recoupment procedures in the case of erroneous payment or when an officer's entitlement to the stipend is terminated and recoupment is indicated.

b. In the case of an erroneous certification or stipend payment, the total amount erroneously paid will be recouped.

c. When recoupment is indicated per paragraph 11–11a, the officer will repay the United States an amount equal to the total amount paid to the officer under the New STRAP including any applicable accrued interest at the interest rate specified in 10 USC 2005.

d. Any amount paid by an officer under recoupment procedures will not relieve the officer from any military obligation imposed by any other law or regulation. Such repayment also will not affect the officer's obligation to serve in the ARNGUS or USAR under the terms of the New STRAP service agreement.

11–13. The contractual service obligation and method of fulfillment

a. An officer who participates in the New STRAP incurs an obligation to serve 2 years in the IRR, or 2 years in the Selected Reserve (except on AGR status), as appropriate, for each year or partial year for which he or she receives financial assistance. This contractual obligation is incurred when the officer signs DA Form 5685–R. This contractual obligation may extend beyond the officer's statutory military service obligation incurred by law (AR 135–91 and 10 USC 651).

b. Unless the officer is earlier terminated from the program, discharge of the contractual agreement will not begin until successful completion of the specialized training program. Such discharge will continue uninterrupted until the obligation is fully satisfied. This is unless the officer is sooner separated at the discretion of HQDA, or unless the method of satisfaction of the obligation is altered by voluntary participation in another educational or training program, or by a change of component or duty status.

(1) The Selected Reserve contractual obligation can also be satisfied by service on AD (Active Army or AGR status) or full-time National Guard duty (FTNGD) (AGR status) (see below).

(2) With the consent of the New STRAP manager, the IRR contractual obligation may also be satisfied by service in the Selected Reserve, or on AD (Active Army or AGR status) or FTNGD (AGR status) (see below).

c. A participant who elects to satisfy his or her New STRAP obligation in the—

(1) Selected Reserve (except on AGR status), must meet participation requirements and serve not less than 12 days of active duty for training (ADT) each year during the period of service required by the agreement.

(2) IRR must serve not less than 30 days of initial ADT and not less than 5 days of ADT each year thereafter during the period of service required by the agreement.

d. In the event an officer enters on AD (Active Army or AGR status) or on FTNGD (AGR status) while serving an obligation under the New STRAP, such officer will perform 1 year of AD or FTNGD for each year or part thereof for which a stipend was received under this program. However, this obligation will be reduced by any amount of qualifying service performed by such officer in the Selected Reserve (except AGR status) after completion of New STRAP training. Selected Reserve service (except AGR service) will be computed using the 2-for-1 formula cited in *a* above. In any event, the obligation to serve on AD or FTNGD (not including annual training (AT) or ADT) will not be reduced to a period of time less than 1 year.

(1) Time spent in graduate professional education (for example, fellowships), while serving on AD, will not be creditable toward satisfying the New STRAP obligation.

(2) Periods of service on AT, ADT, AD for special work (ADSW), or a temporary tour of AD (TTAD), as described in AR 135-200 and AR 135-210, will not be included in the computation of AD to satisfy the 1-for-1 AD obligation. Such tours of duty will be counted toward the 2-for-1 obligation as provided in *a* above.

(3) Only whole years of AD or FTNGD will receive 1-for-1 credit. Periods of AD or FTNGD of less than 1 year will be credited for the reduction of the 2-for-1 obligation as though they were nonactive duty service, using the formula in *a* above.

11-14. Failure to complete the contractual service obligation

An officer who fails to meet prescribed training requirements during the term of contractual service obligation (para 11-13) may be subject to disciplinary action under the UCMJ, or to administrative measures or sanctions under applicable regulations (i.e. AR 135-91, chap 6, AR 135-175, chap 2). In addition, the officer may be ordered to AD in the Active Army for a period not to exceed 2 years.

11-15. Requirement for licenser as a Certified Registered Nurse Anesthetist (CRNA)

a. A New STRAP participant completing a program in nurse anesthesia must successfully complete the Certified Registered Nurse Anesthetist (CRNA) certification examination given by the National Association of Nurse Anesthetists. The participant must take the first available examination following completion of the training program. On notification of certification, the participant must apply for award of the nurse anesthetist specialty designator.

b. Two attempts to pass the examination are authorized before the participant is required to begin serving in a nursing specialty other than nurse anesthesia. Participants who have failed the CRNA certification examination and have been awarded a specialty designator other than 66F may be reclassified as a 66F (Nurse Anesthetist) on successful certification as a CRNA and application for award of the nurse anesthetist specialty designator.

11-16. Application procedures

a. Civilian physician New STRAP applicants seeking concurrent appointment in the ARNGUS or USAR MC will contact their area National Guard AMEDD recruiter or USAR AMEDD personnel counselor, respectively, to initiate an application.

b. Civilian nurse New STRAP applicants seeking concurrent appointment in the ARNGUS or USAR AN will contact their area National Guard AMEDD recruiter or USAREC Nurse Corps recruiter, respectively to initiate an application. In addition to the AN initial appointment application, the applicant must complete the NEW STRAP application packet (table 11-2). In some cases the same document must be provided in both application packets. Separate boards are held for initial appointment and New STRAP selection and certain documents are required by both. In such cases, copies of the original documents found in the initial appointment packet will suffice for inclusion in the New STRAP application packet.

c. USAR MC officers will contact appropriate unit personnel (if a TPU officer) or PMO (if an IRR or IMA officer) to initiate a New STRAP application. The local AMEDD personnel counselor will assist the applicant, unit, and PMO with preparation and submission of the New STRAP application packets. USAR MC New STRAP applications will be forwarded to: Commander, U.S. Army Health Professional Support Agency, ATTN: SGPS-PDE (New STRAP), 5109 Leesburg Pike, Falls Church, VA 22041-3258.

d. ARNGUS MC and AN officers will contact appropriate unit personnel to initiate a New STRAP application. ARNGUS AMEDD recruiters may be contacted for assistance in application preparation and submission. ARNGUS MC New STRAP applications will be forwarded to: Commander, U.S. Army Health Professional Support Agency, ATTN: SGPS-PDN (ARNGUS Liaison), 5109 Leesburg Pike, Falls Church, VA 22041-3258.

e. USAR AN officers will contact appropriate unit personnel (if a TPU officer) or PMO (if an IRR or IMA officer) to initiate a New STRAP application. USAR AN New STRAP applications will be forwarded to: Commander, U.S. Army Health Professional Support Agency, ATTN: SGPS-PDC (New STRAP), 5109 Leesburg Pike, Falls Church, VA 22041-3258.

f. All applications will be forwarded with a cover sheet that lists the following information about the applicant:

- (1) Name.
- (2) Social Security Number (SSN).
- (3) Rank.
- (4) Applicant's area of concentration (AOC).
- (5) Address.
- (6) Business and home phone numbers.
- (7) Educational institution or specialty training site.
- (8) Address of institution or training site.
- (9) Program.
- (10) Program start date.
- (11) Projected program completion date.
- (12) Unit of assignment.
- (13) Address of the unit of assignment (TPU only).
- (14) Phone number of the unit of assignment (TPU only).

g. Tables 11-1 through 11-3 list documents required for New STRAP application. Tables 11-1 and 11-3 include items that must be certified by the unit commander or CG, ARPERCEN, or their authorized representatives, in addition to those items that must be sent directly to the unit commander (for TPU officers) or the PMO at ARPERCEN (for IRR or IMA officers). Application packets will be assembled and tabbed in the sequence listed in the appropriate table.

h. New STRAP accessions officers at USAPHSA will forward DA Form 209 (Delay, Referral or Follow-Up Notice) to the applicant's unit or PMO, upon initial receipt of the application packets. Units and PMOs should contact the New STRAP manager (para 11-3f) if the DA Form 209 is not received within 3 weeks of the date application was mailed to USAHPSA.

11-17. Selection procedures

a. The AMEDD Accession Boards Coordinating Activity will convene the New STRAP Selection Board under the authority of TSG. The New STRAP Selection Board will normally be conducted on the day following the adjournment of the Selection Board for Reserve of the Army Appointments for MC and AN officers.

b. The completed New STRAP application packets of all fully qualified officers will be assembled in accordance with paragraph 11-16 and will be reviewed by the Board. The instructions to the Board will emphasize that all other considerations being equal, selection priority will be given to applicants in the second half of their training programs.

c. Following the Board deliberations, the Board secretariat will compile recommended selected and the not selected lists of the current applicants. When the number of qualified applicants exceeds available quotas, a board will be conducted to determine the best qualified applicants. Recommendations will be published on an order-of-merit list (OML).

d. On receipt of the approved board results, notification will be sent to all applicants. Applicants who were not selected will also be notified that they may reapply 1 year from the date the results of the selection board are approved. Notification will be by appropriate selected or not selected letters.

11-18. Enrollment procedures

a. If the applicant is selected to participate in the New STRAP, the officer will be sent a New STRAP enrollment packet consisting of the following:

- (1) DA Form 5685-R.
- (2) Standard Form 1199A (Authorization for Deposit of Federal Recurring Payments).
- (3) TD Form IRS W4 (Employee Withholding Allowance Certificate).
- (4) A program participation verification letter (fig 11-1).

b. The applicant must complete the New STRAP enrollment packet. All forms must be typewritten, completed in their entirety, and signed with original signatures.

c. MC applicants must have their signatures witnessed.

(1) The signature of an ARNGUS MC officer will be witnessed by the unit recruiter, or by the unit commander, or by his or her representative.

(2) The signature of a USAR MC officer assigned to a TPU will be witnessed by the AMEDD personnel counselor, or by the unit commander, or by his or her representative.

(3) The signature of a USAR MC officer assigned to the IRR or an IMA position will be witnessed by another commissioned officer or by a notary public.

d. AN applicants must have their signatures witnessed.

(1) The signature of an ARNGUS AN officer, or a USAR AN officer assigned to a TPU, will be witnessed by their recruiter, or by the unit commander, or his or her representative.

(2) The signature of a USAR AN officer assigned to the IRR or an IMA position will be witnessed by another commissioned officer or by a notary public.

e. The enrollment packet, when completed, must be sent to the New STRAP manager (para 11-3f) who will sign DA Form 5685-R on behalf of TSG.

f. One copy of the completed DA Form 5685-R will be forwarded through appropriate channels to be filed in the officer's official military personnel file (OMPF).

11-19. Reporting requirements

a. According to instructions published by the New STRAP manager, unit commanders and Cdr, ARPERCEN (DARP-OPS) will report on a semiannual basis the status of their officers participating in the New STRAP.

b. Officers participating in the New STRAP will be reported in the Reserve Components Common Personnel Data System (RCCPDS) according to DOD Instruction 7730.54 (DD-RA(M)1147 and DD-RA(M)1148). Participants will be reported as follows:

(1) For an officer assigned to a TPU, the—

(a) Reserve Component Category (RCC) is "U."

(b) Training Retirement Category (TRC) is "X."

(c) Reserve Component Incentive Program Type (Record Field 67) is "L."

(2) For an officer assigned to an IMA position, the—

(a) RCC is "T."

(b) TRC is "B."

(c) Record Field 67 is "L."

(3) For an officer assigned to the IRR, the—

(a) RCC is "P."

(b) TRC is "J."

(c) Record Field 67 is "L."

c. After successful completion of the specialized training program the officer will commence service under the contractual obligation. At this time the RCC and TRC will be determined by the category applicable to the contractual obligation (DOD Directive 1215.6, table 1).

11-20. Mobilization

Officers participating in the New STRAP will not be available to local commanders, or to CG, ARPERCEN, in meeting mobilization cross-leveling requirements unless such action is approved by TSG. In the event of war or national emergency, participants will be subject to order to AD as required by HQDA (DAPE-MPO).

Table 11-1
New STRAP application packet for ARNGUS or USAR medical corps officer assigned to a TPU, the IRR, or an IMA position

Sequence	Item (to be verified)
_____ 1	Curriculum vitae and resume.
_____ 2	Letter of recommendation from the unit commander (for TPU officers only).
_____ 3	Signed statement from the unit commander, (or CG, ARPERCEN, or their authorized representatives) which certifies the following: (a) Applicant meets all New STRAP eligibility criteria (para 11-4). (b) Applicant's credential file is current and complete and that all credentials have been directly verified with the issuing institution per AR 40-68. (c) Compliance with medical fitness standards for retention per AR 40-501 or NGR 40-501. (d) Compliance with physical fitness standards per AR 350-15. (e) Compliance with body fat standards per AR 600-9.
_____ 4	Letter of recommendation from program director which must include statements indicating if the program is a pyramid program, projected completion date, whether the applicant is likely to complete the program at that institution, and the applicant's relative standing in the program. ¹
_____ 5	Letter of recommendation from 2 other residency staff members. ¹

Notes:

Items sent directly to unit commander (for TPU officer) or the ARPERCEN PMO (for an IRR or IMA officer).

Table 11-2
New STRAP application packet for initial appointment to ARNGUS or USAR in the Army Nurse Corps

Sequence	Items
_____ 1	Letter of acceptance from an approved program with the number of credit hours enrolled and the credit hours required for full-time student status annotated.
_____ 2	Official transcripts for all undergraduate and graduate course work.
_____ 3	USAREC Form 524 (Personnel Data Sheet).
_____ 4	Letter to the board president addressing professional goals and objectives.
_____ 5	USAREC Form 195 (Applicant Evaluation Sheet).
_____ 6	AN counselor and ARNGUS AMEDD recruiter interview.
_____ 7	Letter of recommendation from anesthesia program director (for nursing anesthesia programs only).
_____ 8	AN counselor and ARNGUS AMEDD recruiter interview.
_____ 9	SF 88 and SF 93 (completed within 12 months preceding application).

Table 11-3
New STRAP application packet for ARNGUS or USAR Army Nurse Corps officer assigned to a TPU, the IRR, or an IMA position

Sequence	Item (to be verified)
_____ 1	Copy of current professional nursing license(s).
_____ 2	Curriculum vitae or resume of professional work experience.
_____ 3	Letter to the president of the board addressing professional goals and objectives.
_____ 4	Signed statement from unit commander or CG, ARPERCEN, (or their authorized representatives) which certifies the following: ¹ (a) Applicant meets all New STRAP eligibility criteria (para 11-4). (b) Compliance with medical fitness standards for retention per AR 40-501 or NGR 40-501. (c) Compliance with physical fitness standards per AR 350-15. (d) Compliance with body fat standards per AR 600-9.
_____ 5	Letter of acceptance from an approved program with number of credit hours enrolled and the credit hours required for full-time student status annotated. ¹
_____ 6	Official transcripts for all undergraduate and graduate course work. ¹
_____ 7	Letters of recommendation from 2 professional nurse supervisors, or faculty, who can comment on the applicant's professional practice within the year preceding the application. ¹
_____ 8	Letter of recommendation from the unit chief nurse (TPU officers only). ¹

Notes:

Items sent directly to unit commander (for a TPU officer) or to the ARPERCEN PMO (for an IRR or IMA officer).

(Letterhead)

(Date)

SUBJECT: Verification of Program Participation

FOR: U.S. Army Health Professional Support Agency
ATTN: SGPS-PDC (New STRAP)
5109 Leesburg Pike
Falls Church, VA 22041-3258

(Name of New STRAP participant) is in good academic standing and is enrolled as a full-time student, resident, or is earning at least 50% of the credit hours required for full-time student status in the following program: ***(Program)*** at ***(Educational facility and official mailing address)*** with an anticipated graduation or completion date of *(Date)*.

Affix

(Signature of Department Chief or Chairman)

Official

(Title)

Seal

Figure 11-1. Sample verification letter

Appendix A References

Section I Required Publications

AR 135–91

Service Obligations, Methods of Fulfillment, Participation Requirements, and Enforcement Procedures. (Cited in paras 1–8, 1–14, 1–15, 2–6, 3–7, 4–3, 4–5, 4–6, 4–7, 5.1–5, 5.1–6, 5.2–10, 5–5, 7–9, 8–8, and 11–10.)

AR 135–133

Ready Reserve Screening, Qualification Records System, and Change of Address Reports. (Cited in para 11–8.)

AR 135–178

Separation of Enlisted Personnel. (Cited in para 8–8.)

AR 135–200

Active Duty for Training, Annual Training, and Active Duty for Special Work of Individual Soldiers. (Cited in paras 10–3 and 11–13.)

AR 135–210

Order to Active Duty as Individuals During Peacetime. (Cited in paras 5–3, 9–5, 10–3, and 11–13.)

AR 140–10

Assignments, Attachments, Details, and Transfers. (Cited in paras 1–8, 5–4, 9–7, and 11–4.)

AR 140–111

U.S. Army Reserve Enlistment and Reenlistment Program. (Cited in paras 1–12, 4–3, 4–4, 5.1–1, 5.1–3, 5.2–4, 5.2–9, and 5.2–10.)

AR 140–158

Enlisted Personnel Classification, Promotion, and Reduction. (Cited in para 4–3.)

AR 600–8–2

Suspension of Favorable Personnel Actions (Flags). (Cited in paras 1–15 and 11–8.)

AR 601–210

Regular Army and Army Reserve Enlistment Program. (Cited in paras 1–8, 1–12, 4–4, 5–4, 5.1–1, 5.1–3, 5.2–4, 5.2–9, 5.2–10, 8–3, and 9–7.)

AR 611–201

Enlisted Career Management Fields and Military Occupational Specialties. (Cited in paras 4–3, 4–7, and 5–3.)

AR 635–10

Processing Personnel for Separation. (Cited in para 5–4.)

NGR 600–200

Enlisted Personnel Management. (Cited in paras 1–8, 1–12, 4–3, 4–4, 5–3, 5–4, 5.1–1, 5.1–3, 8–3, and 9–7.)

NGR 614–1

Inactive Army National Guard Administration. (Cited in paras 4–6 and 6–2.)

Section II Related Publications

AR 37–104–10

Military Pay and Allowance Procedures for Inactive Duty Training Joint Uniform Pay System–Reserve Components (JUMPS–(RC)–Army).

AR 140-1

Mission, Organization, and Training.

AR 140-185

Training and Retirement Point Credits and Unit Level Strength Accounting Records.

AR 635-200

Enlisted Personnel.

Section III**Prescribed Forms****DA Form 4977-R**

Individual Ready Reserve Bonus Program—Agreement. (Prescribed in para 5.2-9.)

DA Form 5261-R

Selected Reserve Incentive Program—Nonprior Service Enlistment Bonus Addendum. (Prescribed in paras 2-3 and 3-5.)

DA Form 5261-1-R

Selected Reserve Incentive Program—Educational Assistance Addendum. (Prescribed in para 2-5.)

DA Form 5261-2-R

Selected Reserve Incentive Program—Reenlistment/Extension Bonus Addendum. (Prescribed in paras 4-3 and 4-6.1.)

DA Form 5261-3-R

Selected Reserve Incentive Program—Affiliation Bonus Addendum. (Prescribed in paras 5-2 and 5-4.)

DA Form 5261-4-R

Student Loan Repayment Program Addendum. (Prescribed in para 5.1-3.)

DA Form 5261-5-R

Selected Reserve Incentive Program—Prior Service Enlistment Bonus Addendum. (Prescribed in para 2.1-3.)

DA Form 5435-R

Statement of Understanding, Selected Reserve Educational Assistance Program. (Prescribed in para 8-3.)

DA Form 5447-R

Officer Service Agreement. (Prescribed in para 8-3.)

DA Form 5536-R

Health Professionals Loan Repayment Program Agreement. (Prescribed in paras 7-3, 7-4, and 7-5.)

DA Form 5642-R

Statement of Understanding and Selected Reserve Service Agreement—Basic Educational Assistance Entitlement for Service in the Selected Reserve . (Prescribed in paras 9-4, 9-5, and 9-7.)

DA Form 5685-R

New Specialized Training Assistance Program (New STRAP) Service Agreement. (Prescribed in paras 11-4 and 11-5.)

DD Form 2384

Selected Reserve Educational Assistance (GI Bill) Notice of Basic Eligibility (NOBE) (Prescribed in paras 8-4, 8-7, and 8-8.1.)

DD Form 2384-1

Notice of Basic Eligibility (NOBE). (Prescribed in paras 8-4, 8-7, and 8-8.1.)

DD Form 2475

DOD Loan Repayment Program (LRP) Annual Repayment Application. (Prescribed in para 5.1–7.)

Section IV**Referenced Forms****DA Form 201**

(Military Personnel Records Jacket, U.S. Army)

DA Form 209

(Delay, Referral, or Follow-Up Notice)

DA Form 3540 Series

(Certificate and Acknowledgment of Service Requirements for Individuals Enlisting, Reenlisting, or Transferring into Troop Program Units of the U.S. Army Reserve)

DA Form 4688 Series

(Certificate and Acknowledgment of Service Requirements for Individuals Enlisting or Reenlisting in the Individual Ready Reserve)

DA Form 4836

(Oath of Extension of Enlistment or Reenlistment)

DD Form 4 Series

(Enlistment/Reenlistment Document—Armed Forces of the United States)

DD Form 2366

(Veterans Educational Assistance Act of 1984 (GI Bill))

Standard Form 1199A

(Authorization for Deposit of Federal Recurring Payments)

TD Form IRS W4

(Employee Withholding Allowance Certificate)

VA Form 22–1990

(Application for Educational Benefits)

Appendix B**Worksheet for Case 5**

Case 5: John Benton is a full-time college student. In September 1977 and again in September 1978, he borrowed Guaranteed Student Loans through the Federal Student Loan Program. In October 1980 he joined the Selected Reserve but continued his college education full-time. In December 1980 he borrowed \$1000 to pay for his last semester in college. Because he is eligible for the Student Loan Repayment Program, his student loans will be repaid in the following manner. (See Table B–1).

Table B-1
Worksheet for Case 5

Eligible Loans Incurred	Date	Loan	Outstanding Balance Principal	+ Interest	= Balance	*Calculating Entitlement	**Making Disbursements to Lenders
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
Loan A							
GSL \$2000	1 Sep 77	Loan A	\$2000	+ (Note 1)	= \$2000		
Loan B							
GSL \$1000	1 Sep 78	Loan A	\$2000	+ 0	= \$2000		
		Loan B	\$1000	+ 0	= \$1000		
		Total			\$3000		
	1 Oct 80	Enlisted in the Selected Reserve, qualified for the Student Loan Repayment Program					
Loan C							
GSL \$1000	1 Dec 80	Loan A	\$2000	+ 0	= \$2000		
		Loan B	\$1000	+ 0	= \$1000		
		Loan C	\$1000	+ 0	= \$1000		
		Principal Due	Entitlement		\$4000		
	1 Oct 81	Loan A	\$2000 (66%)	+ 0	= \$2000	(15% of \$2000=\$300) Pays \$500 (66% of \$500)	Lender A: = \$330+(no interest due)
		Loan B	\$1000 (34%)	+ 0	= \$1000	(15% of \$1000=\$150)	Lender B: = \$170+(no interest due)
		Loan C	\$1000 (0%)	+ 0	= (\$1000)	(Note 2)	Lender C: = \$0
		Balance	(100%)		\$4000	Entitlement (Note 3)	\$500 Paid Out (Note 3)
	1 Dec 81	Loan C has been outstanding 12 months but entitlement is only calculated on the anniversary date of the soldier's enlistment.					
	1 Oct 82	Loan A	\$1670	+ 0	= \$1670	(15% of \$2000=\$300)	Lender A: = \$300+(no interest due)
		Loan B	\$830	+ 0	= \$830	(15% of \$1000=\$150) Pays \$725	Lender B: = \$150+(no interest due)
		Loan C	\$1000	+ 0	= \$1000	(15% of \$1000=\$150) (10/12 of \$150=\$125) (Note 4)	Lender C: = \$275+(no interest due)
		Balance			\$3500	Entitlement \$725	Paid Out \$725
	1 Oct 83	Loan A	\$1370	+ 0	= \$1370	(15% of \$2000=\$300)	Lender A: = \$300+(no interest due)
		Loan B	\$680	+ 0	= \$680	(15% of \$1000=\$150) Pays \$600	Lender B: = \$150+(no interest due)
		Loan C	\$725	+ 0	= \$725	(15% of \$1000=\$150)	Lender C: = \$150+(no interest due)
		Balance			\$2775	Entitlement \$600	Paid Out \$600
	1 Oct 84	Loan A	\$1070	+ 0	= \$1070	(15% of \$2000=\$300)	Lender A: = \$300+(no interest due)
		Loan B	\$530	+ 0	= \$530	(15% of \$1000=\$150) Pays \$600	Lender B: = \$150+(no interest due)
		Loan C	\$575	+ 0	= \$575	(15% of \$1000=\$150)	Lender C: = \$150+(no interest due)
		Balance			\$2175	Entitlement \$600	Paid Out \$600
	1 Oct 85	The process is continued until loans are repaid or the soldier is separated from the Selected Reserve, or completes the term of service. If, on satisfactory completion of the term of service, the soldier remains (immediately reenlists/extends) in the Selected Reserve, then an entitlement may be paid on a pro rata basis for that portion of the last year served under the original Loan Repayment agreement.					

Notes:

*Total Outstanding Equals 15% of the outstanding loan balance, or \$500, whichever is greater PLUS all interest.

**Payment to the lender. Entitlement and interest due. If \$500 is paid each lender receives a pro rata share.

The Department of Education will pay the interest on a student loan if the borrower is enrolled at least part-time in a postsecondary institution. It will also pay the interest if the borrower is unemployed, a full-time member of Volunteers in Service To America (VISTA), or other qualifying public service organizations. There are other conditions under which the interest will be paid. These conditions are explained in the Handbook for Student Financial Aid Administrators, 1981-1982, Department of Education. In this case, the interest is paid by the Department of Education because the soldier is a full-time student.

A soldier must complete 12 months of service since securing a loan to earn entitlement for loan repayment.

Five hundred is paid because it is greater than 15% of the original principal due entitlement. In disbursement, each lender receives a share of the \$500 equal to his or her share of the principal outstanding eligible for repayment, plus all interest due the loans he or she holds in behalf of the soldier.

Since 1 Dec 80, Loan C has accumulated 1 year plus 10 months of entitlement. A full payment of \$150 is made plus a prorated payment of \$125 for the additional 10 months of earned entitlement. 10/12 of \$150=\$125 for a total of \$275.

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INDIVIDUAL READY RESERVE BONUS PROGRAM—AGREEMENT

For use of this form, see AR 135-7; the proponent agency is DCSPER

ADDENDUM TO DA FORM 4688 SERIES (CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING OR REENLISTING IN THE INDIVIDUAL READY RESERVE), AND DA FORM 4836 (OATH OF EXTENSION).

DATA REQUIRED BY THE PRIVACY ACT OF 1984 (5 USC 552a)

AUTHORITY: Title 10 USC Section 270, 10 USC 673a and Executive Order 9397, 22 November 1943.

PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement to the IRR bonus and to ensure that your agreement to these conditions is a matter of record.

ROUTINE USES: Confirmation of obligation and participation requirements for entitlement to the IRR bonus: occasionally as a basis for termination and recoupment if requirements are not met.

DISCLOSURE: Disclosure of your SSN is voluntary; however, if not provided you will not be eligible for IRR enlistment/reenlistment or extension bonus.

SECTION I. APPLICABILITY

This agreement will be completed by all persons enlisting/reenlisting or extending in the Individual Ready Reserve (IRR) with entitlement to the IRR bonus. This agreement will be reproduced locally.

SECTION II. INSTRUCTIONS

The service representative is responsible for providing counseling, or if counseling is not feasible for providing written responses to the applicant, concerning the applicant's obligations under the terms of this agreement. After all counseling, or response to queries, and the affixing of proper signatures, a copy of this agreement will be stapled to each copy of the DA Form 4688 Series.

SECTION III. ACKNOWLEDGMENT

In connection with my enlistment/reenlistment or extension in the United States Army Reserve (USAR) under the IRR Bonus Program, I hereby affirm that I meet the following eligibility criteria:

1. I am currently a member of the IRR, or will be on the effective date of this enlistment/reenlistment or extension agreement.
2. I have completed, or am within six (6) months of completing, a statutory or contractual military service obligation.
3. I will not have completed more than fourteen (14) years military service at my current ETS.
4. I possess a military occupational speciality (MOS) that has been approved for the bonus by HQDA.
5. I am not enlisting/reenlisting or extending for active duty in an Active Guard/Reserve (AGR) status.
6. I am not barred from reenlistment in the USAR.
7. I meet the basic eligibility requirements as a prior service applicant under AR 601-210 or I meet the eligibility requirements for immediate reenlistment in the USAR under AR 140-111.
8. _____ (Initial) I will be required to participate in training on an annual basis as directed by the Commanding General, U.S. Army Reserve Personnel Center, according to Army regulations. The type and extent of training I will be required to perform will depend on the requirements of my military occupational speciality (MOS) and the needs of the Army. This may include training in a pay status which normally will not exceed 30 days.

SECTION IV. OBLIGATION

☐ (Applicant must initial this block.) I understand that on accepting this enlistment/reenlistment or extension bonus entitlement, and as a matter of continued entitlement, I incur an obligation to serve as an enlisted member in the Individual Ready Reserve for a period of three (3) years from the effective date of my enlistment/reenlistment or extension. I must respond to all official military correspondence and assure that Commanding General, U.S. Army Reserve Personnel Center (DARP-EPO), 9700 Page Boulevard, St. Louis, MO 63132-5200, remains informed of my current address, marital status, number of dependents, civilian employment, and any change in my physical condition, per Section 562, Title 10, US Code.

SECTION V. ENTITLEMENT

I am eligible for an ENLISTMENT/REENLISTMENT OR EXTENSION BONUS IN THE AMOUNT OF \$ _____ as specified below:

(Administering official will enter the appropriate dollar amount above and in paragraph 1 below. Member will initial all paragraphs.)

1. _____ (Initial) I understand I am enlisting/reenlisting or extending for the bonus amount listed above with an initial payment of _____ dollars and two subsequent payments of _____ dollars on satisfactory completion of the first and second year of the enlistment/reenlistment or extension.
2. _____ (Initial) I understand that procedures for bonus payments will be initiated by CG ARPERCEN, and payment will be made on completion of administrative processing of the properly executed Enlistment/Reenlistment or Extension contract.
3. _____ (Initial) All incentive payments are subject to Federal and State withholding tax.

SECTION VI. TERMINATION

In the event my entitlement to an IRR bonus is terminated for any of the reasons listed below, before the fulfillment of my enlistment/reenlistment or extension agreement, I may be required to refund a pro-rata amount to the government.

1. Failure to participate satisfactorily as required by applicable USAR regulations.
2. Separation from the Ready Reserve as an enlisted person for any reason. This includes but is not limited to:
 - a. Enlistment into another Armed Force, including the Delayed Entry Program of another Armed Force.
 - b. Enlistment into the Regular Army or the Delayed Entry Program (DEP) of the Regular Army.
 - c. Voluntary entry/reentry into the active forces.
 - d. Appointment as a Commissioned/Warrant Officer and less than 1 year of the contract has been served satisfactorily.
 - e. Enrollment in the Reserve Officers Training Corps (ROTC) advanced course or assignment to Control Group (ROTC).
3. Voluntary transfer to the Selected Reserve.
4. Acceptance of a civilian position where membership in the Reserve is a condition of employment (*persons on temporary assignment are excluded*) if less than one-half of the contract has been served.

SECTION VII. RECOUPMENT

I understand that if termination of my entitlement is for any of the reasons cited in Section VI above, except death, disability, involuntary recall to active duty, or voluntary transfer to the Selected Reserve, recoupment procedures will be initiated and I may be required to refund a pro-rata amount to the government. Determination of a refund amount will be computed as follows:

1. The number of full months I have served during the enlistment/reenlistment or extension period for which the bonus was paid, will be multiplied by \$20.83.
2. The sum of the above computation will be subtracted from the gross amount of bonus paid to me.
3. I agree to refund that amount to the Treasury of the United States.

SECTION VIII. STATEMENT OF UNDERSTANDING

I have read and understand each of the statements above and have had my questions answered satisfactorily. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my eligibility/entitlement to an enlistment/reenlistment or extension bonus. Any other promise, representation, or commitments made to me in connection with this enlistment/reenlistment or extension bonus is written below in my own handwriting, or is hereby waived. (*If none, indicate by writing the word "NONE" below.*)

(Date Signed)

(Applicant's Signature)

(SSN)

(Typed or Printed Name and Rank)

(Bonus Control Number)

(Street Address)

(Apartment)

(City)

(State)

(ZIP Code)

(Mail check to above address)

SECTION IX. CERTIFICATION BY SERVICE REPRESENTATIVE

I certify that I have witnessed the reading and signing of the above agreement and the signature appearing thereon is that of the applicant. No other promises were made to the applicant as a condition of this enlistment/reenlistment or extension with entitlement to the bonus. I certify I have counseled the applicant, or where counseling was not feasible, I obtained written responses concerning obligations under this agreement.

(Date Signed)

(Signature of Service Representative)

(Title)

(Typed or Printed Name and Rank)

SELECTED RESERVE INCENTIVE PROGRAM - ENLISTMENT BONUS ADDENDUM

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

ARNGUS: ADDENDUM TO DD FORM 4 SERIES (*ENLISTMENT/REENLISTMENT DOCUMENT - ARMED FORCES OF THE UNITED STATES*)

USAR: ADDENDUM TO DA FORM 3540 SERIES (*CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING, REENLISTING, OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE U.S. ARMY RESERVE*)

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Section 308c, title 37, USC and section 552a, title 5, USC.
PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under SRIP and to ensure that your agreement to these conditions is a matter of record.
ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the SRIP; occasionally as a basis for suspension, termination, and recoupment if requirements are not met.
DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided, you will not be eligible for the SRIP.

SECTION I - APPLICABILITY

This addendum will be completed by all persons enlisting in the ARNGUS or USAR with concurrent assignment to a troop program unit for cash bonus entitlement under the Selected Reserve Incentive Program (*SRIP*).

SECTION II - INSTRUCTIONS

The service representative is responsible for reading and explaining the Enlistment Bonus requirements outlined on this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each copy of the DD Form 4 series for ARNGUS personnel, or the DA Form 3540 series for USAR personnel.

SECTION III - ACKNOWLEDGMENT

In connection with my enlistment in the Army National Guard of the United States/U.S. Army Reserve for a cash enlistment bonus, I hereby acknowledge I meet the following eligibility criteria:

1. I have never previously served on 1 or more days of active duty or active duty for training.
2. I am a high school graduate, or the equivalent, or I am currently attending high school and expect to graduate before I enter the second phase of initial active duty for training under the split-training option.
3. I have scored 31 or higher on the Armed Forces Qualification Test (*AFQT*).
4. I am not enlisting in the ARNGUS/USAR to fill a permanent civilian position where membership in the Selected Reserve is a condition of employment (*Temporary civilian assignment is excluded*).
5. I am not enlisting for voluntary assignment to full-time active duty or active duty for training exceeding 90 days in support of the Reserve program.
6. I am enlisting in the ARNGUS/USAR with concurrent assignment to a unit of the Selected Reserve for a minimum of 6 years, Incentive entitlement is based on-- (*Initial the appropriate paragraph below.*)

_____ a. Assignment to a high-priority unit authorized by HQDA for a bonus entitlement.

(Enter complete unit identification and UIC)

_____ b. Assignment to a unit (*not high-priority*) authorized by HQDA for a bonus entitlement in an MOS that is also authorized by HQDA for a bonus entitlement.

(Enter MOS and complete unit identification and UIC)

_____ c. Assignment to a unit (*not high-priority*) authorized by HQDA for a bonus entitlement.

(Enter complete unit identification and UIC)

NAME	SSN
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_____ d. Assignment in military occupational specialty (MOS) _____ which is authorized by HQDA for bonus entitlement.

_____ e. Assignment in MOS _____ under the Army Civilian Acquired Skills Program (ACASP) authorized by HQDA for a bonus entitlement.

SECTION IV - OBLIGATION

(Applicant must initial this block) I am enlisting for 8 years (8x0 or 6x2) in the ARNGUS/USAR and I agree to serve my initial 6 years in a bonus unit, or in a bonus MOS, unless excused for the convenience of the Government, to include normal career progression. I must serve satisfactorily, as prescribed by ARNGUS or USAR regulations, unless excused for the convenience of the Government.

SECTION V - ENTITLEMENT

1. According to the option I have initiated in Section III, paragraph 6 above, I am entitled to **one** of the following cash enlistment bonuses: *(Administering official will enter the appropriate dollar amount currently authorized by HQDA in one of the following and the individual will initial the sum.)*

_____ a. HIGH PRIORITY UNIT BONUS =	\$ _____
_____ b. BONUS MOS IN BONUS UNIT =	\$ _____
_____ c. UNIT <i>(not high-priority)</i> BONUS =	\$ _____
_____ d. MOS <i>(not ACASP)</i> BONUS =	\$ _____
_____ e. ACASP MOS BONUS =	\$ _____

2. Except for the ACASP MOS BONUS *(para 1e above)*, bonus payment will be as follows:

a. Initial payment of 50% of the total authorized bonus amount entered in paragraph 1a, b, c, or d above, after receiving my high school diploma, completing initial active duty for training, and qualifying in the MOS.

b. Two subsequent payments of 25% of the total authorized bonus amount entered in paragraph 1a, b, c, or d above, upon satisfactory completion of the 2nd and 4th year of the enlistment term of service.

3. For the ACASP MOS BONUS, payment will be as follows:

a. On enlistment in the Army National Guard of the United States *(ARNGUS)* I will receive:

(1) An initial payment of 20% of the total authorized bonus amount entered in paragraph 1e above, after receiving my high school diploma, and being awarded the ACASP MOS.

(2) An amount of 30% of the total authorized bonus amount entered in paragraph 1e above, on the 3rd anniversary date of my enlistment.

(3) The remainder *(50%)* of the total authorized bonus amount entered in paragraph 1e above, on the 5th anniversary date of my enlistment.

b. On enlistment in the United States Army Reserve *(USAR)* I will receive:

(1) An initial payment of 50% of the total authorized bonus amount entered in paragraph 1e above, after receiving my high school diploma, and being awarded the ACASP MOS.

(2) An amount of 20% of the total authorized bonus amount entered in paragraph 1e above, on the 3rd anniversary date of my enlistment.

(3) The remainder *(30%)* of the total authorized bonus amount entered in paragraph 1e above, on the 5th anniversary date of my enlistment.

4. I understand all incentive payments are subject to Federal and State income tax withholdings.

5. I understand procedures for payment of the ENLISTMENT BONUS will be initiated by my unit commander. I further understand I cannot receive any portion of the ENLISTMENT BONUS until I have received my high school diploma equivalent, completed initial active duty for training, and have been awarded my MOS, or received sufficient training to be deployable.

NAME	SSN
<p align="center">SECTION VI - SUSPENSION</p> <p>I understand that under certain conditions I can be suspended on a one-time basis for a specified period from the incentive program, rather than being terminated. Suspensions are limited to the following conditions:</p> <ol style="list-style-type: none"> 1. Temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Inactive National Guard or Individual Ready Reserve for personal reasons for up to 1 year. Reinstatement to a partial or full resumption of incentive eligibility, when authorized, requires extending my term of service equal to the period I was in a nonavailable status and reestablishing my basic incentive eligibility. 2. I must remain MOS qualified unless changed through unit reorganization, relocation, redesignation, deactivation, or conversion. If I am reassigned to a new position for any other reason and I am not MOS qualified, bonus payments will be suspended. I must become MOS qualified within 12 months if on-the-job training (<i>OJT</i>) is required, or within 24 months if attendance at a service school is required. If otherwise eligible, I will be entitled to receive bonus payments (<i>section V</i>) when I become MOS qualified in the new position. 3. If I enter a period of service where favorable personnel actions on my behalf are suspended, entitlement to subsequent bonus payment will also be suspended. If otherwise eligible, I will be entitled to receive bonus payments (<i>section V</i>) when the suspension has been favorably lifted. This excludes suspension of favorable personnel actions for Army Physical Fitness Test failure or failure to meet body fat standards. 	
<p align="center">SECTION VII - TERMINATION</p> <p>My entitlement to the enlistment bonus will be terminated should any of the following conditions occur before the fulfillment of my enlistment agreement and obligation. Should I --</p> <ol style="list-style-type: none"> 1. Become an unsatisfactory participant per AR 135-91. This could result in a recoupment action as explained in section VIII below. 2. Move to a nonbonused unit or MOS, or if I am reclassified. This could result in a recoupment action as explained in section VIII below. However, my bonus entitlement will not terminate if I move to another Selected Reserve unit or MOS for normal career progression, or because my current unit has been reorganized, relocated, redesignated, inactivated, or converted, or if my move has been approved by the Chief, National Guard Bureau or the Chief, Army Reserve. 3. Fail to become MOS qualified within 12 months, if required to perform on-the-job training, or within 24 months if required to attend a service school, following a voluntary reassignment to a bonus authorized MOS or unit other than that for which I have herein contracted. This could result in a recoupment action as explained in section VIII below. 4. Be separated from my status as an enlisted soldier assigned to a unit of the Selected Reserve, for any reason, except when separated for an authorized period of nonavailability or entry on AD or FTNGD in an AGR status. This could result in recoupment action as explained in Section VIII below unless the separation is due to - <ol style="list-style-type: none"> a. Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force; or b. Acceptance of immediate appointment as an officer in the Ready Reserve after I have served 1 year or more in a Selected Reserve unit under this agreement; or c. Death, injury, illness, or other impairment not the result of my own misconduct; or d. Involuntary order to extended active duty in the Active Army; or e. Becoming an assigned member of Control Group (<i>ROTC</i>). 5. Accept a permanent civilian position where membership in the Selected Reserve is a condition of employment. If I have not satisfactorily served 6 months or more of the Selected Reserve Service under this agreement before accepting a permanent civilian position, I could be subject to a recoupment action as explained in section VIII below. 6. Exceed the maximum period authorized for suspension during a period of nonavailability. This could result in a recoupment action as explained in section VIII below. 7. Fail to extend my ARNGUS or USAR contracted term of service to compensate for a period of nonavailability. This could result in a recoupment action as explained in section VIII below. 8. Enroll in the Senior Reserve Officers Training Corps (<i>SROTC</i>) with assignment to Control Group (<i>ROTC</i>), or if I become a participant in the ROTC Simultaneous Membership Program (<i>SMP</i>). While enrollment in the SROTC, or participation in the SMP will terminate bonus entitlement, it will not result in recoupment action. 	

NAME	SSN
<p>9. Complete at least 6 years in a Selected Reserve unit as I have agreed to do under the terms of this contract.</p> <p>10. Enter on the second phase of alternate (<i>split</i>) training without proof of qualification as a secondary school graduate.</p> <p>_____ 11. (<i>Applicant must initial</i>) Be transferred between the USAR and the ARNGUS. The following rules will apply:</p> <p style="margin-left: 40px;">a. If, as a member of the USAR entitled to bonus payments under this program, I transfer to the ARNGUS--</p> <p style="margin-left: 80px;">(1) Because my USAR troop program unit has been reorganized, relocated, redesignated, inactivated, or converted, I will not terminate my entitlement and will continue receiving bonus payments according to the schedule established with my USAR agreement.</p> <p style="margin-left: 80px;">(2) For any reason other than (1) above, I will terminate my entitlement to bonus payments under this program unless the Chief, National Guard Bureau authorizes continued entitlement on enlistment in the ARNGUS, or the bonus is based on enlistment through the ACASP and I remain in the bonused MOS.</p> <p style="margin-left: 40px;">b. If, as a member of the ARNGUS entitled to bonus payments under this program, I transfer to a USAR Selected Reserve unit and provided I remain otherwise eligible, I will not terminate my entitlement and will continue receiving bonus payments according to the schedule established with my ARNGUS agreement.</p>	
SECTION VIII - RECOUPMENT	
<p>If my entitlement to the enlisted bonus is terminated for a reason listed in paragraphs 1 through 7 of section VII above, I may be subject to recoupment action. The recoupment amount will be calculated as follows:</p> <p>1. The number of months served satisfactorily during the term of enlistment will be multiplied by the proportionate monthly dollar amount (<i>total bonus authorized divided by 72 months</i>).</p> <p>2. The product of the above will be subtracted from the total amount of bonus paid to me to date, including initial and subsequent payments.</p> <p>3. If the above calculation indicates overpayment to me, I will be required to refund that amount to the U.S. Government. If the calculation indicates I have earned more than I have been paid, I will be paid a final payment in the amount due me.</p> <p>4. Any refund made by me will not affect my period of obligation to serve in the ARNGUS or USAR.</p>	
SECTION IX - STATEMENT OF UNDERSTANDING	
<p>I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my enlistment for cash bonus. Any other representation, or commitments, made to me in connection with my enlistment for a cash bonus have been entered below in my own handwriting, or they are hereby waived. (<i>If none, indicate by writing the word "NONE" below.</i>)</p>	
DATE SIGNED	APPLICANT'S SIGNATURE
SSN	TYPED OR PRINTED NAME AND RANK
SECTION X - CERTIFICATION BY SERVICE REPRESENTATIVE	
<p>I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the applicant meets the eligibility requirements of AR 135-7, paragraph 2-3, and the applicant's unit of assignment (<i>section III, para 6a</i>) or MOS (<i>section III, para 6b</i>) is currently eligible for an enlistment cash bonus. No other promises were made to the applicant as a condition of entitlement to an enlistment cash bonus under the Selected Reserve Incentive Program. I have provided the applicant with a copy of this form.</p>	
DATE SIGNED	SIGNATURE OF SERVICE REPRESENTATIVE
TITLE	TYPED OR PRINTED NAME AND RANK

SELECTED RESERVE INCENTIVE PROGRAM - REENLISTMENT/EXTENSION BONUS ADDENDUM

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

ARNGUS: ADDENDUM TO DD FORM 4 SERIES (*ENLISTMENT/REENLISTMENT DOCUMENT - ARMED FORCES OF THE UNITED STATES*) OR DA FORM 4836 (*OATH OF EXTENSION OF ENLISTMENT OR REENLISTMENT*).

USAR: ADDENDUM TO DA FORM 3540 SERIES (*CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING, REENLISTING, OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE U.S. ARMY RESERVE.*)

NOTE: THE TERM "EXTENSION," AS USED IN THIS ADDENDUM, APPLIES TO ARMY NATIONAL GUARD OF THE UNITED STATES (*ARNGUS*) SOLDIERS WHO MAY CONTRACT FOR THIS PROGRAM EITHER BY REENLISTMENT OR EXTENSION. U.S. ARMY RESERVE (*USAR*) SOLDIERS CONTRACT FOR THIS PROGRAM ONLY BY REENLISTMENT.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY : Section 308b, title 37, USC and section 552a, title 5, USC.
PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under SRIP and to ensure that your agreement to these conditions is a matter of record.
ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the SRIP; occasionally as a basis for suspension, termination, and recoupment if requirements are not met.
DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided, you will not be eligible for the SRIP.

SECTION I - APPLICABILITY

This addendum will be completed by all persons assigned to the ARNGUS or USAR units who are immediately reenlisting/extending for entitlement to a cash bonus under the Selected Reserve Incentive Program (*SRIP*).

SECTION II - INSTRUCTIONS

The service representative is responsible for reading and explaining the reenlistment/extension cash bonus requirements outlined in this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each copy of the DD Form 4 series for ARNGUS personnel, or the DA Form 3540 series for USAR personnel.

SECTION III - ACKNOWLEDGMENT

In connection with my immediate reenlistment/extension in the Army National Guard of the United States, or my immediate reenlistment in the U.S. Army Reserve, for a cash bonus, I hereby acknowledge that I meet the following eligibility criteria:

1. I meet the immediate reenlistment/extension requirements of NGR 600-200 as a member of the ARNGUS, or the immediate reenlistment criteria of AR 140-111 as a member of the USAR, and --
 - a. I am within 3 months before or 24 hours after expiration of my current Selected Reserve contractual obligation; or
 - b. I am assigned to a USAR unit, have satisfactorily completed my Selected Reserve contractual obligation, and I have a remaining statutory military service obligation. I am electing to reenlist and remain assigned to the USAR unit. I am reenlisting for a term of service that qualifies me for the cash bonus under section V below and the term is equal to or greater than the term of my remaining statutory military service obligation.
2. I have not previously received a reenlistment/extension bonus for service in the Selected Reserve.
3. I have been a satisfactory participant in the Selected Reserve for the 3 months preceding this reenlistment or extension by attending all scheduled drills and satisfactorily completing the entire period of annual training, unless excused by proper authority.
4. I am not reenlisting/extending to fill a permanent civilian position where membership in the Selected Reserve is a condition of employment (*temporary civilian assignment is excluded*).
5. I hold rank as required by the position vacancy for which I am reenlisting/extending, or within authorized substitutability. (*AR 140-10 for USAR, and NGR 600-200 for ARNGUS*).
6. I am qualified (*individual must initial applicable paragraph*)--
 - a. In a military occupational specialty (*MOS*), _____, which has been approved as a bonus MOS and correlates to the position vacancy for which I am reenlisting/extending; or
 - b. In an MOS which correlates to the position vacancy for which I am reenlisting/extending in a unit which has been approved as bonus unit; or
 - c. As a drill sergeant with SQI 'X,' assigned to a Selected Reserve training brigade/division in a valid drill sergeant duty position.

NAME	SSN
SECTION IV - OBLIGATION	
<div style="border: 1px solid black; width: 60px; height: 40px; margin: 0 auto;"></div>	<p>(Applicant must initial this block) I am reenlisting/extending in the ARNGUS/USAR for _____ years. I understand and hereby acknowledge that I must serve this entire period in an ARNGUS/USAR Selected Reserve unit satisfactorily, as prescribed by Army regulations and this agreement, unless excused for the convenience of the Government.</p>
SECTION V - ENTITLEMENT	
<p>I am eligible for a reenlistment/extension bonus as specified below: <i>(Individual must initial applicable paragraph.)</i></p> <p>_____ 1. I have less than 6 years total military service at current ETS and I am reenlisting/extending for 6 years for a bonus of \$2,500. The initial payment will be \$500. The remainder will be paid in six increments of \$200 (1st yr); \$300 (2nd yr); \$300 (3rd yr); \$400 (4th yr); \$400 (5th yr); and \$400 (6th yr). The incremental payments will be paid on satisfactory completion of each year of the 6-year term of service.</p> <p>_____ 2. I have at least 6 but not more than 10 years <i>(exactly)</i> total military service at current ETS and I am reenlisting/extending for 6 years for a bonus of \$2,500. The initial payment will be \$500. The remainder will be paid in six increments of \$200 (1st yr); \$300 (2nd yr); \$300 (3rd yr); \$400 (4th yr); \$400 (5th yr); and \$400 (6th yr). The incremental payments will be paid on satisfactory completion of each year of the 6-year term of service.</p> <p>_____ 3. I have at least 6 but not more than 10 years <i>(exactly)</i> total military service at current ETS and I am reenlisting/extending for 3, 4, or 5 years for a bonus of \$1,250. The initial payment will be \$250. The remainder will be paid in three increments of \$200 (1st year); \$400 (2nd year); and \$400 (3rd year). The incremental payments will be paid on satisfactory completion of each year of the first 3 years of the term of service.</p> <p>4. All cash bonus payments are subject to Federal and State income tax.</p>	
SECTION VI - SUSPENSION	
<p>I understand that under certain conditions I can be suspended on a one-time basis for a specified period from the incentive program, rather than being terminated. Suspensions are limited to the following conditions:</p> <p>1. Temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Inactive National Guard or Individual Ready Reserve for personal reasons for up to 1 year. Reinstatement to a partial or full resumption of incentive eligibility, when authorized, requires extending my term of service equal to the period I was in a nonavailable status and reestablishing my basic incentive eligibility.</p> <p>2. I must remain MOS qualified unless changed through unit reorganization, relocation, redesignation, inactivation, or conversion. If I am reassigned to a new position for any other reason and I am not MOS qualified, bonus payments will be suspended. I must become MOS qualified within 12 months if on-the-job training (OJT) is required, or within 24 months if attendance at a service school is required. If otherwise eligible, I will be entitled to receive bonus payments <i>(section V)</i> when I become MOS qualified in the new position.</p> <p>3. If I enter a period of service where favorable personnel actions on my behalf are suspended, entitlement to subsequent bonus payments will also be suspended. If otherwise eligible, I will be entitled to receive bonus payments <i>(section V)</i> when the suspension has been favorably lifted. This excludes suspension of favorable personnel actions for Army Physical Fitness Test failure or failure to meet body fat standards.</p>	
SECTION VII - TERMINATION	
<p>My entitlement to the reenlistment/extension cash bonus will be terminated should any of the following conditions occur before the fulfillment of my reenlistment/extension agreement. Should I --</p> <p>1. Become an unsatisfactory participant per AR 135-91. This could result in a recoupment action as explained in section VIII below.</p> <p>2. Move to a non-bonus unit or MOS, or if I am reclassified. This could result in a recoupment action as explained in Section VIII below. However, my bonus entitlement will not terminate if I move to another Selected Reserve unit or MOS for normal career progression, or because my current unit has been reorganized, relocated, redesignated, inactivated, or converted, or if my move has been approved by the Chief National Guard Bureau or the Chief Army Reserve.</p> <p>3. Fail to become MOS qualified within 12 months, if required to perform on-the-job training, or within 24 months if required to attend a service school, following a voluntary reassignment to a bonus authorized MOS or unit other than that for which I have herein contracted. This could result in a recoupment action as explained in section VIII below.</p>	

NAME	SSN
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SECTION VII - TERMINATION (Continued)

4. Be separated from my status as an enlisted soldier assigned to a unit of the Selected Reserve, for any reason, except when separated for an authorized period of nonavailability or entry on AD or FTNGD in an AGR status. This could result in recoupment action as explained in Section VIII below unless the separation is due to --

- a. Unit inactivation, reorganization, conversion, relocation, reduction of overstrength, or reduction in force; or
- b. Acceptance of appointment as a commissioned officer or warrant officer after I have served 1 year or more in a Selected Reserve unit under this agreement; or
- c. Death, injury, illness, or other impairment not the result of my own misconduct; or
- d. Involuntary order to extended active duty in the Active Army; or
- e. Becoming an assigned member of Control Group (ROTC).

5. Accept a permanent civilian position where membership in the Selected Reserve is a condition of employment. If I have not satisfactorily served 6 months or more of the Selected Reserve service under this agreement before accepting a permanent civilian position, I could be subject to a recoupment action as explained in section VIII below.

6. Exceed the maximum period authorized for suspension during a period of nonavailability. This could result in a recoupment action as explained in section VIII below.

7. Fail to extend my ARNGUS or USAR contracted term of service to compensate for a period of nonavailability. This could result in a recoupment action as explained in section VIII below.

8. Am a participant in the USAR Drill Sergeant Program and voluntarily transfer to a non-drill sergeant (SQ/ "X") duty position.

9. Enroll in the Senior Reserve Officers Training Corps (SROTC) with assignment to Control Group (ROTC), or if I become a participant in the ROTC Simultaneous Membership Program (SMP). While enrollment in the SROTC or participation in the SMP will terminate bonus entitlement, it will not result in a recoupment action.

10. Complete the term of service in the Selected Reserve as I have agreed to do under the terms of this contract and as indicated in section IV (Obligation) above.

_____ 11. (Applicant must initial) Be transferred between the USAR and the ARNGUS, the following rules will apply:

- a. If, as a member of the USAR entitled to bonus payments under this program, I transfer to the ARNGUS--
 - (1) Because my USAR troop program unit has been reorganized, relocated, redesignated, inactivated, or converted, I will not terminate my entitlement and will continue receiving bonus payments according to the schedule established with my USAR agreement.
 - (2) For any reason other than (1) above, I will terminate my entitlement to bonus payments under this program unless the Chief, National Guard Bureau authorizes continued entitlement on enlistment in the ARNGUS, or the bonus is based on enlistment through the ACASP.
- b. If, as a member of the ARNGUS entitled to bonus payments under this program, I transfer to a USAR Selected Reserve unit and provided I remain otherwise eligible, I will not terminate my entitlement and will continue receiving bonus payments according to the schedule established with my ARNGUS agreement.

SECTION VIII - RECOUPMENT

If my entitlement to the reenlistment/extension cash bonus is terminated for a reason listed in paragraphs 1 through 7 of section VII above, I may be subject to recoupment action. The recoupment amount will be calculated as follows:

- 1. The number of months served satisfactorily during the term for which the bonus was paid will be multiplied by \$34.72.
- 2. The result of the above will be subtracted from the total amount of bonus paid to me to date (initial and subsequent payments).
- 3. If the above calculation indicates overpayment to me, I will be required to refund that amount to the U.S. Government. If the calculation indicates I have earned more than I have been paid, I will be paid a final payment in the amount due me.
- 4. Any refund made by me will not affect my period of obligation to serve in the ARNGUS or USAR.

NAME		SSN	
SECTION IX - STATEMENT OF UNDERSTANDING			
<p>I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my reenlistment/extension for a cash bonus. Any other promise, representation, or commitments, made to me in connection with this agreement for the reenlistment/extension bonus have been entered below in my own handwriting, or they are hereby waived. (If none, indicate by writing the word "NONE" below.)</p>			
DATE SIGNED		APPLICANT'S SIGNATURE	
SSN		TYPED OR PRINTED NAME AND RANK	
SECTION X - CERTIFICATION BY SERVICE REPRESENTATIVE			
<p>I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the applicant meets the eligibility requirements of AR 135-7, and the soldier's MOS (<i>section III, para 6a</i>) or unit of assignment (<i>section III, para 6b</i>) is currently eligible for a reenlistment/extension cash bonus. No other promises were made to the applicant as a condition of entitlement to the reenlistment/extension cash bonus under the Selected Reserve Incentive Program. I have provided the applicant with a copy of this form.</p>			
DATE SIGNED		SIGNATURE OF SERVICE REPRESENTATIVE	
TITLE		TYPED OR PRINTED NAME AND RANK	

SELECTED RESERVE INCENTIVE PROGRAM - AFFILIATION BONUS ADDENDUM

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

ARNGUS: ADDENDUM TO DD FORM 4 SERIES (*ENLISTMENT/REENLISTMENT DOCUMENT - ARMED FORCES OF THE UNITED STATES*)

USAR: ADDENDUM TO DA FORM 3540 SERIES (*CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING, REENLISTING, OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE U.S. ARMY RESERVE*)

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Section 308e, title 37, USC and section 552a, title 5, USC.

PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under SRIP and to ensure that your agreement to these conditions is a matter of record.

ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the SRIP; occasionally as a basis for suspension, termination, and recoupment if requirements are not met.

DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided, you will not be eligible for the SRIP.

SECTION I - APPLICABILITY

This addendum will be completed by all persons accepting assignment to ARNGUS or USAR units with entitlement to an affiliation cash bonus under the Selected Reserve Incentive Program (*SRIP*).

SECTION II - INSTRUCTIONS

The service representative is responsible for reading and explaining the affiliation bonus requirement outlined in this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each copy of the DD Form 4 for ARNGUS personnel, or the DA Form 3540 series for USAR personnel.

SECTION III - ACKNOWLEDGMENT

In connection with my assignment to _____,
(*Enter complete unit identification and UIC*)

a unit of the Selected Reserve of the U.S. Army, I hereby acknowledge that I meet the following eligibility criteria:

1. I am in the Active Army or I am serving on active duty in an Active Guard Reserve status and I have 180 days or less remaining on my active duty obligation; or I have served on active duty in an active component of the U.S. Armed Forces or on Active Guard Reserve status, satisfactorily completed that term of service, and have been released from active duty under honorable conditions.

2. On release from active duty, I will have a remaining statutory military service obligation; or, if already released from active duty, I have a remaining statutory military service obligation and am currently serving a period of Reserve service obligation.

3. I will be eligible to reenlist or extend my active duty service at the time of my release from active duty; or, if already released from active duty, I was eligible to reenlist or extend my active duty service at the time I was released.

4. I am (*Applicant will initial the appropriate statement*):

_____ a. Being assigned to a unit vacancy in the Selected Reserve which is authorized the grade and military occupational specialty (*MOS*) I currently hold. Service grade and MOS substitution rules apply; or

_____ b. SQI "X" qualified and being assigned to a valid drill sergeant (*SQI 'X'*) duty position in a Selected Reserve training division or brigade. Additionally, I hold the rank or am no more than two grades lower than the pay grade specified for the vacancy.

5. I am not accepting this agreement to qualify for a permanent civilian position where membership in the Selected Reserve is a condition of employment (*temporary civilian assignment is excluded*).

6. I have not previously received an affiliation bonus for service in the Selected Reserve.

7. I have exactly _____ years, _____ months, and _____ days remaining on my statutory military service obligation as of the date signed in section VIII below. I understand my total affiliation bonus will be based on the number of whole months I have remaining on my statutory military service obligation which I will serve in the Selected Reserve.

8. I have not enlisted under the IRR Direct Enlistment Program.

NAME	SSN
SECTION IV - OBLIGATION	
<div style="border: 1px solid black; width: 60px; height: 40px; margin: 0 auto;"></div>	<p><i>(Applicant must initial this block)</i> With entitlement to the affiliation bonus and assignment to a unit of the Selected Reserve. I must serve in a Selected Reserve unit for the remaining period of my statutory military service obligation, satisfactorily, as prescribed by ARNGUS or USAR regulations and this agreement, unless excused for the convenience of the Government.</p>
SECTION V - ENTITLEMENT	
<p><i>I will be paid an affiliation bonus as follows: (Individual will initial the appropriate paragraph.)</i></p> <p>_____ 1. By affiliating from active duty or Ready Reserve status with 18 months or less remaining of my MSO, I will receive a lump sum payment consisting of the entire amount of the bonus which is computed by multiplying \$50 by the number of whole months for which affiliating as shown in section III, paragraph 7, above. The bonus payment will be initiated by the gaining unit commander per published procedures on execution of this form and assignment to the Selected Reserve unit.</p> <p>_____ 2. By affiliating from active duty or Ready Reserve status with more than 18 months remaining of my MSO, I will receive an initial payment of one-half of the bonus amount on completion of this form and assignment to the Selected Reserve unit. The remainder of the bonus will be paid on the sixth anniversary date of my MSO, which commenced with my original enlistment in the Armed Forces. If my original bonus was in a Delayed Entry Program, the remainder of the bonus will be paid on the sixth anniversary date of my initial entry on active duty. The bonus will be computed by multiplying \$50 by the number of whole months for which I am affiliating as shown in section III, paragraph 7, above. The payments will be initiated by the gaining unit commander per published procedures on execution of this form and assignment to the Selected Reserve unit.</p> <p>3. All affiliation bonus payments are subject to Federal and State income tax withholdings.</p>	
SECTION VI - TERMINATION	
<p>My entitlement to an affiliation bonus will be terminated should any of the following conditions occur before completion of my statutory military service obligation <i>(MSO)</i>:</p> <p>1. Become an unsatisfactory participant per AR 135-91. This could result in a recoupment action as explained in Section VII below.</p> <p>2. Move to a duty military occupational specialty <i>(DMOS)</i> in which I am not qualified, or if I am reclassified, except for normal career progression, or when my unit is reorganized, relocated, redesignated, inactivated, or converted, or where the Chief, National Guard Bureau, or Chief, Army Reserve has approved the move.</p> <p>3. Fail to become MOS qualified within 12 months, if required to perform on-the-job training, or within 24 months if required to attend a service school, following reassignment to a duty position authorized an MOS for which I am not qualified or other than that for which I have herein contracted. This could result in a recoupment action as explained in section VII below.</p> <p>4. If I am separated from my enlisted status, or from a USAR Selected Reserve unit, for any reason, except when separated for an authorized period of nonavailability or for entry on AD or FTNGD in an AGR status. This could result in a recoupment action as explained in Section VII below unless the separation is because:</p> <p style="margin-left: 40px;">a. My unit has been inactivated, reorganized, converted, or relocated, or because of a reduction of overstrength, or reduction in force.</p> <p style="margin-left: 40px;">b. Of my acceptance of immediate appointment as an officer in the Ready Reserve after 1 year or more of the enlistment term has been satisfactorily served.</p> <p style="margin-left: 40px;">c. I have been enrolled in the ROTC Advanced Course and assigned to Control Group <i>(ROTC)</i>.</p> <p style="margin-left: 40px;">d. Of death, injury, illness, or other impairment not the result of my own misconduct.</p> <p style="margin-left: 40px;">e. I have been involuntarily ordered to extended active duty in the Active Army.</p> <p>5. Accept a permanent civilian position where membership in the Selected Reserve is a condition of employment. If I have not satisfactorily served 6 months or more of the Selected Reserve service under this agreement before accepting a permanent civilian position, I could be subject to a recoupment action as explained in section VII below.</p> <p>6. Am a participant in the USAR Drill Sergeant Program and voluntarily transfer to a non-drill sergeant <i>(SQ/ "X")</i> duty position.</p>	

NAME		SSN	
<p>7. Enroll in the Senior Reserve Officers Training Corps (<i>SROTC</i>) with assignment to Control Group (<i>ROTC</i>), or if I become a participant in the ROTC Simultaneous Membership Program (<i>SMP</i>). While enrollment in the SROTC, or participation in the SMP will terminate bonus entitlement, it will not result in a recoupment action.</p> <p>8. Complete my statutory military service obligation (<i>MSO</i>).</p>			
SECTION VII - RECOUPMENT			
<p>If my entitlement to the affiliation bonus is terminated for a reason listed in paragraphs 1, 3, 4, and 5 of section VI above, I may be subject to recoupment action. The recoupment amount will be calculated as follows:</p> <ol style="list-style-type: none"> 1. The number of whole months served satisfactorily during the affiliation period for which the bonus was paid will be multiplied by \$50. 2. The result of the above will be subtracted from the total amount of the bonus paid to me to date (<i>Initial and subsequent payments</i>). 3. If the calculation indicates overpayment to me, I will refund that amount to the U.S. Government. 4. If the calculation indicates I have earned more than I have been paid to date at the pro rata share, I will receive a final payment in the amount due me. 5. Any refund made by me will not affect my period of obligation to serve in the Ready Reserve. 			
SECTION VIII - STATEMENT OF UNDERSTANDING			
<p>I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my entitlement to an affiliation bonus. Any other promise, representation, or commitments, made to me in connection with this agreement for the affiliation bonus have been entered below in my own handwriting, or they are hereby waived. (<i>If none, indicate by writing the word "NONE" below.</i>)</p>			
DATE SIGNED		APPLICANT'S SIGNATURE	
SSN		TYPED OR PRINTED NAME AND RANK	
SECTION IX - CERTIFICATION BY SERVICE REPRESENTATIVE			
<p>I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the soldier meets the eligibility requirements of AR 135-7. No other promises were made to the applicant as a condition of entitlement to the affiliation bonus. I have provided the applicant with a copy of this form.</p>			
DATE SIGNED		SIGNATURE OF SERVICE REPRESENTATIVE	
TITLE		TYPED OR PRINTED NAME AND RANK	

STUDENT LOAN REPAYMENT PROGRAM ADDENDUM

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

ARNGUS: ADDENDUM TO DD FORM 4 SERIES (*ENLISTMENT/REENLISTMENT DOCUMENT - ARMED FORCES OF THE UNITED STATES*) OR DA FORM 4836 (*OATH OF EXTENSION OF ENLISTMENT OR REENLISTMENT*)

USAR: ADDENDUM TO DA FORM 3540 SERIES (*CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING, REENLISTING, OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE U.S. ARMY RESERVE*)

NOTE: THE TERM "EXTENSION," AS USED IN THIS ADDENDUM, APPLIES TO ARMY NATIONAL GUARD OF THE UNITED STATES (*ARNGUS*) SOLDIERS WHO MAY INITIALLY CONTRACT FOR THIS PROGRAM EITHER BY REENLISTMENT OR EXTENSION. U.S. ARMY RESERVE (*USAR*) SOLDIERS INITIALLY CONTRACT FOR THIS PROGRAM ONLY BY REENLISTMENT. SUBSEQUENT EXTENSIONS OF THE INITIAL ARNGUS OR USAR CONTRACTED TERM OF SERVICE WILL EXTEND THE SOLDIER'S ENTITLEMENTS UNDER THIS PROGRAM.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Section 16301, title 10, USC and section 552a, title 5, USC.
PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under Student Loan Repayment Program (*SLRP*) and to ensure that your agreement to these conditions is a matter of record.
ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the *SLRP*; occasionally as a basis for suspension or termination.
DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided, you will not be eligible for the *SLRP*.

SECTION I - APPLICABILITY

This addendum will be completed by all persons enlisting, reenlisting, immediately reenlisting, or extending in the Selected Reserve of the Army (*ARNGUS* or *USAR*) for entitlement under the Student Loan Repayment Program (*SLRP*).

SECTION II - INSTRUCTIONS

The service representative is responsible for reading and explaining the *SLRP* requirements outlined on this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each copy of the DD Form 4 series, or DA Form 4836, for *ARNGUS* personnel, or the DA Form 3540 series for *USAR* personnel.

SECTION III - ACKNOWLEDGMENT

In connection with my enlistment, immediate reenlistment, or extension in the Army National Guard of the United States (*ARNGUS*) or U.S. Army Reserve (*USAR*), for entitlement to loan repayment under the Student Loan Repayment Program, I hereby acknowledge that I meet the following eligibility criteria (*The applicant will initial the applicable paragraphs*):

1. _____ I have no previous military service, or I have previous military service but I have not completed initial entry training and I am contracting for an initial Selected Reserve term of service of at least 6 years with a concurrent contractual and statutory military service obligation of 8 years. In addition-

a. I have scored 50 or higher on the Armed Forces Qualifications Test (*AFQT*).

b. I am contracting for completion of initial active duty for training (*IADT*) and qualification in military occupational specialty (*MOS*) _____ which HQDA has approved for:

_____ (1) A maximum of \$10,000 in loan repayments; or

_____ (2) A maximum of \$20,000 in loan repayments (*USAR only*).

c. I am a secondary school graduate and I have the supporting documentation; or I am currently in high school and--

_____ (1) I have enlisted for the Standard Training Option. I must present proof of high school graduation before I enter on *IADT*; or

_____ (2) I have enlisted for the Alternate (*Split*) Training Option. I must submit proof of high school graduation before I enter on the second phase of *IADT*. This addendum is void if I enter the second phase of training without proof of graduation.

NAME	SSN
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SECTION III - ACKNOWLEDGMENT *(Continued)*

_____ 2. I have previous military service, or I am currently a member of the ARNGUS or USAR, and I am contracting to serve for 3 or more years in the Selected Reserve. In addition, I am contracting:

a. To serve in military occupational specialty (MOS) _____ *(in which I am qualified)* and that HQDA has approved for: *(Initial as appropriate.)*

_____ (1) A maximum of \$10,000 in loan repayments; or

_____ (2) A maximum of \$20,000 in loan repayments (USAR only).

_____ b. For assignment to a Selected Reserve training brigade/division in a valid drill sergeant duty position for which I am, or will become within 24 months, SQI "X" qualified.

3. I am not contracting in the ARNGUS/USAR to fill a permanent civilian position where membership in the Selected Reserve is a condition of employment *(temporary civilian assignment is excluded)*.

4. I am a high school graduate or equivalent and I have the supporting documentation as required by AR 135-7 and AR 601-210.

SECTION IV - OBLIGATION

I will serve satisfactorily, as prescribed by National Guard or Department of the Army regulations, the obligated term of service in the Selected Reserve according to my enlistment, reenlistment, or extension agreement unless expressly excused for the convenience of the Government. I incur the obligations of this contractual agreement as follows: *(Initial the paragraph below that is applicable to you.)*

_____ 1. I have no previous military service. I am enlisting for 8 years *(8x0 or 6x2)* in the ARNGUS/USAR. I agree to serve my initial 6 years in the Selected Reserve in the MOS I have indicated in section III, paragraph 1b above.

_____ 2. I am not a current member of the ARNGUS/USAR, but I have previous military service. I am enlisting or reenlisting for _____ years *(must be 3 or more years)* in the ARNGUS/USAR. I agree to serve the entire term of service in the Selected Reserve in the MOS I have indicated in section III, paragraph 2.

_____ 3. I am currently a member of the ARNGUS/USAR. I am immediately reenlisting or extending for _____ years *(must be 3 or more, years)*. I agree to serve the entire term of service in the Selected Reserve in the MOS I have indicated in section III, paragraph 2.

SECTION V - ENTITLEMENT

I understand that loan repayment under the SLRP will apply to me as follows:

1. The Government will repay a designated portion of any outstanding loan(s) I have secured since 1 October 1975. Such loan(s) must have been made, insured, or guaranteed under Part B of the Higher Education Act of 1965 *(Guaranteed Student Loans/Federally Insured Student Loans)*, or any loan made under Part E of such act *(National Direct Student Loans)*.

2. In addition, qualifying educational loan(s) made by me while a member of the Selected Reserve during this contractual term of service will also be repaid in part under this incentive.

3. Repayment of the qualifying student loan(s) will be made after each year of satisfactory service in the Selected Reserve after securing the loan(s) and reaching the anniversary date of this agreement. For each year of satisfactory service in the Selected Reserve, the loan amount to be repaid will be as follows: *(The applicant will initial the applicable paragraph.)*

_____ a. A maximum of \$10,000 during my military career as I have acknowledged in section III, above, and that amount will not increase. The amount to be repaid each year will not exceed 15% of the original balance *(a maximum of \$1,500)* or \$500, whichever is greater, plus the accrued interest.

_____ b. A maximum of \$20,000 during my military career as I have acknowledged in section III, above, and that amount will not increase. The amount to be repaid each year will not exceed 15% of the original balance *(a maximum of \$3,000)* or \$500, whichever is the greater, plus the accrued interest. Further, I understand my eligibility for the \$20,000 SLRP is based on MOS _____ as shown in section III, above. I will be subject to reduced benefits if I move to an MOS not eligible for this amount.

NAME	SSN
SECTION V - ENTITLEMENT (Continued)	
<p>4. I understand that--</p> <p style="margin-left: 40px;">a. The repayment of student loans by the Government is not automatic under the terms of this addendum. It is my responsibility to initiate the request for loan repayments during each year that I meet the requirements explained in this addendum, by completing DD Form 2475 (<i>DOD Educational Loan Repayment Program (LRP) Annual Application</i>) and submitting it to personnel officials in my command.</p> <p style="margin-left: 40px;">b. I should arrange for deferment or forbearance with lenders or note holders on loans which are falling due.</p> <p style="margin-left: 40px;">c. Loan repayments will only be made to the lender or noteholder and nothing in this agreement will be construed as authority to refund any repayment of a loan.</p> <p>5. Loan repayments are subject to Federal and State income tax withholdings.</p>	
SECTION VI - SUSPENSION	
<p>I understand that under certain conditions I can be suspended on a one-time basis for a specified period from loan repayment under the SLRP rather than being terminated. Suspensions are limited to the following conditions:</p> <p>1. Temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Inactive National Guard or Individual Ready Reserve for personal reasons up to 1 year. Reinstatement to a partial or full resumption of loan repayments, when authorized, requires extending my term of service equal to the period I was in a nonavailable status and reestablishing my eligibility and adjusting my anniversary date.</p> <p>2. I must continue to serve in the MOS for which I contracted. If I am reassigned to another duty MOS in which I am not qualified, loan repayment will be suspended. I must become MOS qualified within 12 months if on-the-job training (<i>OJT</i>) is required, or within 24 months if attendance at a service school is required. However, except where my MOS duty position has been changed through unit reorganization, relocation, redesignation, inactivation, or conversion --</p> <p style="margin-left: 40px;">a. If I contracted for the \$20,000 loan repayment (<i>section V, para 3b</i>) I must become qualified in an MOS which HQDA has approved for this amount or I will be subject to reduced benefits (<i>section V, para 3a</i>); and</p> <p style="margin-left: 40px;">b. If otherwise eligible, I will be entitled to loan repayment when I become MOS qualified in the new position.</p> <p>3. If I enter a period of service where favorable personnel actions on my behalf are suspended, entitlement to subsequent payments will also be suspended. If otherwise eligible, I will be entitled to loan repayments (<i>section V, para 3</i>) when the suspension has been lifted. This excludes suspension of favorable personnel actions for Army Physical Fitness Test failure or failure to meet body fat standards.</p>	
SECTION VII - TERMINATION	
<div style="display: flex; align-items: flex-start;"> <div style="width: 10%; border: 1px solid black; height: 40px; margin-right: 10px;"></div> <div> <p>(Applicant must initial this block) I understand that the terms of this addendum will remain in force as long as I continue to participate satisfactorily under a contractual agreement as a member of the Selected Reserve. I further understand that the terms of this agreement and my entitlement to loan repayment under the SLRP will be terminated should any of the following conditions occur:</p> <ol style="list-style-type: none"> 1. Become an unsatisfactory participant per AR 135-91. 2. If I move to an MOS, or am reclassified in an MOS, other than that for which contracted. Loan repayment will not be terminated if I remain assigned to the Selected Reserve (<i>see para 11 below</i>) and I am moved to another MOS for normal career progression, or when my unit is reorganized, relocated, redesignated, inactivated, or converted, or where the Chief, National Guard Bureau or Chief, Army Reserve has approved the move. 3. Fail to become MOS qualified within 12 months, if required to perform on-the-job training, or within 24 months if required to attend a service school, following a voluntary reassignment to a position in an MOS other than that for which I have herein contracted. 4. Am separated from my enlisted status in the Selected Reserve, for any reason, except for an authorized period of nonavailability. This includes enlistment in the Regular Army or voluntary entry on extended active duty in the Active Army. 5. Accept a permanent civilian position where membership in the Selected Reserve is a condition of employment (<i>a temporary civilian assignment is excluded</i>). 6. Exceed the maximum period authorized for suspension during a period of nonavailability. </div> </div>	

NAME		SSN
SECTION VII - TERMINATION (Continued)		
<p>7. Fail to extend my ARNGUS or USAR contracted term of service to compensate for a period of nonavailability.</p> <p>8. Enter on active duty in an Active Guard Reserve (AGR) status, provided this would be my initial entry on active duty and I am enrolled under the Montgomery GI Bill for active duty service (38 USC Chapter 30).</p> <p>9. Enroll in Senior Reserve Officers Training Corps (SROTC) with assignment to Control Group (ROTC), or if I become a participant in the ROTC Simultaneous Membership Program (SMP).</p> <p>10. Was attending high school at the time of enlistment and I do not become a secondary school graduate within the required timeframe.</p> <p>11. Have reached the maximum portion authorized for loan repayment during my service as a Reserve of the Army (ARNGUS and USAR service combined). The maximum portion of loan repayment that I am authorized during my career is shown in section III, paragraph 2b, above.</p> <p>_____ 12. (Applicant must initial) Transfer between the USAR and the ARNGUS under the following conditions:</p> <p style="padding-left: 40px;">a. If, as a member of the USAR entitled to loan repayment at the \$10,000 or \$20,000 level, I transfer to the ARNGUS --</p> <p style="padding-left: 80px;">(1) Because my USAR troop program unit has been reorganized, relocated, redesignated, inactivated, or converted, I will terminate my entitlement at the \$20,000 level, but will not terminate my entitlement to loan repayment. I will continue entitlement to loan repayment but only at the \$10,000 level.</p> <p style="padding-left: 80px;">(2) For any reason other than (1) above, I will terminate my entitlement to loan repayment at both the \$10,000 and \$20,000 levels, unless the Chief, National Guard Bureau authorizes continued entitlement at the time of enlistment in the ARNGUS.</p> <p style="padding-left: 40px;">b. If, as a member of the ARNGUS entitled to loan repayment under this program, I transfer to a USAR Selected Reserve unit and I remain otherwise eligible, I will not terminate my entitlement and will continue entitlement for loan repayment. However, this transfer will not authorize increasing my entitlement to the \$20,000 level.</p> <p>13. Was attending high school at the time of enlistment and I do not become a secondary school graduate within the required timeframe.</p>		
SECTION VIII - STATEMENT OF UNDERSTANDING		
<p>I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my entitlement, reenlistment, or extension under the SLRP. Any other promise, representation, or commitments, made to me in connection with my enlistment, reenlistment, or extension for the SLRP have been entered below in my own handwriting, or they are hereby waived. (If none, indicate by writing the word "NONE" below.)</p>		
DATE SIGNED	APPLICANT'S SIGNATURE	
SSN	TYPED OR PRINTED NAME AND RANK	
SECTION IX - CERTIFICATION BY SERVICE REPRESENTATIVE		
<p>I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the soldier meets the eligibility requirements of AR 135-7, and the applicant's MOS is currently eligible for the designated portion authorized for loan repayment shown in section III, above. No other promises were made to the applicant as a condition of entitlement under the SLRP. I have provided the applicant with a copy of this form.</p>		
DATE SIGNED	SIGNATURE OF SERVICE REPRESENTATIVE	
TITLE	TYPED OR PRINTED NAME AND RANK	

SELECTED RESERVE INCENTIVE PROGRAM - USAR PRIOR SERVICE ENLISTMENT BONUS ADDENDUM

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY : Section 308i, title 37, USC and section 552a, title 5, USC.

PRINCIPAL PURPOSE: To explain obligation and participation requirements for entitlement under SRIP and to ensure that your agreement to these conditions is a matter of record.

ROUTINE USES: Confirmation of obligation and participation requirements for entitlement under the SRIP; occasionally as a basis for suspension, termination, and recoupment if requirements are not met.

DISCLOSURE: Disclosure of your SSN is voluntary, however, if not provided, you will not be eligible for the SRIP.

ADDENDUM TO DA FORM 3540 SERIES (*CERTIFICATE AND ACKNOWLEDGMENT OF SERVICE REQUIREMENTS FOR INDIVIDUALS ENLISTING, REENLISTING, OR TRANSFERRING INTO TROOP PROGRAM UNITS OF THE U.S. ARMY RESERVE.*)

SECTION I - APPLICABILITY

This addendum will be completed by all persons with previous military service enlisting in the USAR with concurrent assignment to a troop program unit for a prior service enlistment bonus under the Selection Reserve Incentive Program (*SRIP*).

SECTION II - INSTRUCTIONS

The service representative is responsible for reading and explaining the prior service enlistment bonus requirements outlined in this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be stapled to each of DA Form 3540.

SECTION III - ACKNOWLEDGMENT

In connection with my enlistment in the U.S. Army Reserve for the prior service enlistment bonus, I hereby acknowledge I meet the following eligibility criteria:

1. I meet the requirements for enlistment in the USAR per AR 601-210 or AR 601-280.
2. I have not previously received a bonus for enlistment, reenlistment, or extension of service, in any reserve component of the armed forces.
3. I am not enlisting in the USAR to fill a permanent civilian position where membership in the Selected Reserve is a condition of employment (*temporary civilian assignment is excluded*).
4. I am not being released from AD or FTNGD for the purpose of enlistment in the USAR.
5. I am (*individual must initial applicable paragraph*):
 - a. Qualified in military occupational specialty (*MOS*) _____ in which I have successfully served on active duty and attained a level of qualification commensurate with my grade and years of service, and which has been approved as a bonus MOS and correlates to the position vacancy for which I am enlisting.
 - b. Qualified as a drill sergeant in which I have successfully served on active duty where I was awarded skill qualification identifier (*SQI "X"*), and I am enlisting for assignment to a USAR Training Brigade/Division in a valid drill sergeant duty position.
 - c. Not a previous recipient of a bonus for enlistment, reenlistment, or extension of enlistment in a reserve component.
 - d. In receipt of an honorable discharge issued on separation from prior military service.

SECTION IV - OBLIGATION

(*Applicant must initial this block*) I am enlisting in the USAR for _____ years. I understand and hereby acknowledge that I must serve this entire period in a USAR Selected Reserve troop program unit (*TPU*) satisfactorily, as prescribed by Army regulations and this agreement, unless excused for the convenience of the Government.

NAME	SSN
SECTION V - ENTITLEMENT	
<p>I am eligible for a prior service enlistment bonus as specified below: <i>(Individual must initial the applicable paragraph.)</i></p> <p>_____ 1. I have less than 10 years total military service and I am enlisting for 6 years for a bonus of \$5,000. The initial payment will be \$2,500. The remainder will be paid in 6 increments of \$416.66. The incremental payments will be paid on satisfactory completion of each year of the 6-year term of service in a USAR Selected Reserve TPU.</p> <p>_____ 2. I have less than 10 years total military service and I am enlisting for 3 years for a bonus of \$2,500. The initial payment will be \$1,250. The remainder will be paid in 3 increments of \$416.66. The incremental payments will be paid on satisfactory completion of each year of the 3-year term of service in a USAR Selected Reserve TPU.</p> <p>3. All bonus payments are subject to Federal and State income tax.</p>	
SECTION VI - SUSPENSION	
<p>I understand that under certain conditions I can be suspended on a one-time basis for a specified period from the incentive program, rather than being terminated. Suspensions are limited to the following conditions:</p> <p>1. Temporary overseas residence, missionary obligation, or overseas employment obligation for 3 years or less. Also transfer to the Individual Ready Reserve for personal reasons for up to 1 year. Reinstatement to partial or full resumption of incentive eligibility, when authorized, requires extending my term of service equal to the period I was in a nonavailable status and reestablishing my basic incentive eligibility.</p> <p>2. I must continue to serve in a USAR Selected Reserve TPU as a drill sergeant, or in the MOS for which I contracted. If I am reassigned within the Selected Reserve of the USAR to another duty MOS in which I am not qualified, but I remain eligible for the bonus, bonus payments will be suspended. I must become MOS qualified within 12 months if on-the-job training <i>(OJT)</i> is required, or within 24 months if attendance at a service school is required. If otherwise eligible, I will be entitled to receive bonus payments <i>(Section V)</i> when I become MOS qualified in the new position.</p> <p>3. If I enter a period of service where favorable personnel actions on my behalf are suspended, entitlement to subsequent bonus payments will also be suspended. If otherwise eligible, I will be entitled to receive bonus payments <i>(Section V)</i> when the suspension has been favorably lifted. This excludes suspension of favorable personnel actions for Army Physical Fitness Test failure or failure to meet body fat standards.</p>	
SECTION VII - TERMINATION	
<p>My entitlement to the prior service enlistment bonus will be terminated should any of the following conditions occur before the fulfillment of my enlistment agreement:</p> <p>1. If I become an unsatisfactory participant per AR 135-91. This could result in a recoupment action as explained in Section VIII below.</p> <p>2. If I move to an MOS, or am reclassified in an MOS, other than that for which contracted. This could result in recoupment action as explained in Section VIII below. Bonus entitlement will not be terminated and recoupment will not be sought if I remain assigned to a USAR Selected Reserve unit and I am moved to another MOS for normal career progression, or when my unit is reorganized, relocated, redesignated, inactivated, or converted, or where the Chief, Army Reserve has approved the move.</p> <p>3. If, following any voluntary reassignment to an MOS other than that for which I have herein contracted, I fail to become MOS qualified within 12 months, if required to perform on-the-job training, or within 24 months if required to attend a service school. This could result in a recoupment action as explained in Section VIII below.</p> <p>4. If I am separated from my enlisted status, or from a USAR Selected Reserve unit, for any reason, except when separated for an authorized period of nonavailability. This could result in a recoupment action as explained in Section VIII below unless the separation is because:</p> <p style="margin-left: 40px;">a. My unit has been inactivated, reorganized, converted, or relocated, or because of a reduction of overstrength, or reduction in force.</p> <p style="margin-left: 40px;">b. Of my acceptance of immediate appointment as an officer in the Ready Reserve after 1 year or more of the enlistment term has been satisfactorily served.</p> <p style="margin-left: 40px;">c. I have been enrolled in the ROTC Advanced Course and assigned to Control Group <i>(ROTC)</i>.</p> <p style="margin-left: 40px;">d. Of death, injury, illness, or other impairment not the result of my own misconduct.</p> <p style="margin-left: 40px;">e. I have been involuntarily ordered to extended active duty in the Active Army.</p> <p style="margin-left: 40px;">f. Of entry on active duty in an Active Guard Reserve status.</p>	

NAME	SSN
SECTION VII - TERMINATION (Continued)	
<p>5. If I accept a permanent civilian position where membership in the Selected Reserve is a condition of employment. If I have not satisfactorily served 6 months or more in the Selected Reserve under this agreement before accepting a permanent civilian position, I could be subject to a recoupment action as explained in Section VIII below.</p> <p>6. If I exceed the maximum period authorized for suspension during a period of nonavailability. This could result in a recoupment action as explained in Section VIII below.</p> <p>7. If I fail to extend my USAR contracted term of service to compensate for a period of nonavailability. This could result in a recoupment action as explained in Section VIII below.</p> <p>8. If I contracted to participate in the USAR Drill Sergeant Program and voluntarily transfer to a non-drill sergeant (SQI "X") duty position. This could result in a recoupment action as explained in Section VIII below.</p> <p>9. If I enroll in the Senior Reserve Officers Training Corps (SROTC) with assignment to Control Group (ROTC), or if I become a participant in the ROTC Simultaneous Membership Program (SMP). While enrollment in the SROTC or participation in the SMP will terminate bonus entitlement, it will not result in a recoupment action.</p> <p>10. When I complete the term of service in the Selected Reserve as I have agreed to do under the terms of this contract and as indicated in Section IV (Obligation) above.</p> <p>11. (Applicant must initial) As a member of the USAR Selected Reserve entitled to bonus payments under this program, I understand that if I transfer to the ARNGUS for any reason I will terminate my entitlement to bonus payments under this program.</p>	
SECTION VIII - RECOUPMENT	
<p>If my entitlement to the prior service enlistment bonus is terminated for a reason listed in paragraphs 1 through 8 of Section VIII above, I may be subject to recoupment action. The recoupment amount will be calculated as follows:</p> <p>1. The number of months served satisfactorily during the term for which the bonus was paid will be multiplied by \$69.44.</p> <p>2. The result of the above will be subtracted from the total amount of the bonus paid to me to date (initial and subsequent payments).</p> <p>3. If the above calculation indicates overpayment to me, I will be required to refund that amount to the U.S. Government. If the calculation indicates I have earned more than I have been paid, I will be paid a final payment in the amount due me.</p> <p>4. Any refund made by me will not affect my period of obligation to service in the USAR.</p>	
SECTION IX - STATEMENT OF UNDERSTANDING	
<p>I have read and understand each of the statements above and have had my questions satisfactorily answered. I understand the statements above are intended to constitute all promises and agreements, whatsoever, concerning my enlistment for prior service enlistment bonus. Any other promise, representation, or commitment made to me in connection with my enlistment for this bonus have been entered below in my own handwriting, or they are hereby waived. (If none, indicate by writing the word "NONE" below.)</p>	
DATE SIGNED	APPLICANT'S SIGNATURE
SSN	TYPED OR PRINTED NAME AND RANK
SECTION X - CERTIFICATION BY SERVICE REPRESENTATIVE	
<p>I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant. I have verified the soldier meets the eligibility requirements and the soldier's contracted MOS (Section III, para 5) is currently authorized for a cash bonus. No other promises were made to the applicant as a condition of entitlement to the prior service enlistment bonus under the Selected Reserve Incentive Program. I have provided the applicant with a copy of this form.</p>	
DATE SIGNED	SIGNATURE OF SERVICE REPRESENTATIVE
TITLE	TYPED OR PRINTED NAME AND RANK

STATEMENT OF UNDERSTANDING - THE SELECTED RESERVE MONTGOMERY GI BILL
(10 USC CHAPTER 1606)

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Title 10, USC, chapter 1606, and section 552a, title 10, USC.
PRINCIPAL PURPOSE: To explain obligation and eligibility requirements for entitlement under the Selected Reserve Montgomery GI Bill (10 USC Chap 1606) and to ensure that your understanding of these conditions is a matter of record.
ROUTINE USES: Information on eligibility and entitlement under the Montgomery GI Bill.
DISCLOSURE: Disclosure of your SSN is voluntary.

SECTION I - APPLICABILITY

This Statement of Understanding will be completed by all soldiers on assignment to, or serving in, the Selected Reserve of the U.S. Army, regardless of Selected Reserve Montgomery GI Bill eligibility status.

SECTION II - INSTRUCTIONS

The service representative is responsible for explaining the Montgomery GI Bill requirements and benefits outlined on this form. Following the reading, explanation, and affixing of proper signatures, a copy of this form will be filed in the soldier's official military personnel file (OMPF).

SECTION III - QUALIFICATIONS

1. Effective 1 July 1985, the Selected Reserve Montgomery GI Bill (*SEL RES MGIB*) prescribed by AR 135-7, chapter 8, and codified in law (*10 USC Chap 1606*), provides financial assistance for the pursuit of educational programs approved by the Department of Veterans Affairs (*DVA*) to qualified officers, warrant officers, and enlisted soldiers serving in the Selected Reserve. To qualify for entitlement under the SEL RES MGIB, I understand that on or after 1 July 1985, a soldier must:

a. Contract to serve at least 6 years in the Selected Reserve by enlisting, reenlisting, or extending an enlistment or reenlistment, in the Army National Guard of the United States or the U.S. Army Reserve with concurrent assignment to the Selected Reserve. A commissioned officer or warrant officer must agree to serve in the Selected Reserve for 6 years in addition to any other Selected Reserve obligation.

b. Be a secondary school graduate. An enlisted soldier with no previous military service must be a secondary school graduate before completion of initial active duty for training (*IADT*).

c. Complete, or have completed, initial active duty for training (*IADT*) or the equivalent which is required for all accessions including basic military and technical skill training.

d. Not -

(1) Be an unsatisfactory participant; or

(2) Elect to credit service toward the Montgomery GI Bill for active duty service (*38 USC Chap 30*); or

(3) Be receiving financial (*scholarship*) assistance under 10 USC 2107 as a member of the Reserve Officers Training Corps; or

(4) Be pursuing graduate studies or a course of education leading to a degree above a baccalaureate (*see paragraphs 2 and 3 below*); or

(5) Be serving in an Active Guard Reserve status.

2. Prior to 1 October 1990, soldiers who had received a baccalaureate degree, or equivalent, or completed a course of instruction required for award of same, could not qualify for, or were terminated from, educational assistance under the SEL RES MGIB. Since that date, a soldier who has received a baccalaureate degree and qualifies under paragraph 1 above, can receive assistance in pursuing additional courses approved by the Department of Veterans Affairs by contracting for an additional 6 years of Selected Reserve service.

3. Effective 1 October 1990, a soldier who qualifies under paragraph 1 above and contracts for 6 years of Selected Reserve service; or a soldier who is currently under the SEL RES MGIB and contracts for an additional 6 years of Selected Reserve service, may receive assistance in pursuing vocational, technical, or flight training programs or graduate courses approved by the DVA.

NAME	SSN
SECTION IV - ENTITLEMENT	
<p>I understand that -</p> <ol style="list-style-type: none"> 1. The date of my basic entitlement to educational assistance under the SEL RES MGIB will be established the day I meet all of the qualifications specified in section III, paragraph 1, above. I will be eligible to utilize the SEL RES MGIB benefits only when my basic date of entitlement has been established. 2. When entitlement is established, I will be required to sign a Notice of Basic Eligibility (<i>NOBE</i>) which will fully explain satisfactory participation, monthly entitlements, authorized nonparticipation, expiration of entitlements, and prohibited duplication of educational benefits. The NOBE will be provided to me by supporting personnel officials in my command. 3. Any additional Selected Reserve contractual service incurred under section III, paragraphs 2 or 3 above, will not change my basic date of entitlement established under paragraph 1 above. 	
SECTION V - BENEFITS	
<ol style="list-style-type: none"> 1. If qualified, I will be eligible to receive educational assistance to pursue a program of education in an amount determined by the Department of Veterans Affairs and as announced annually by Headquarters, Department of the Army. 2. The maximum benefit period is 36 months based on full-time status, or 48 months based on 3/4-time status, or 72 months based on 1/2-time status, or the number of months determined by the Department of Veterans Affairs based on less than 1/2-time status, or any combination that will not exceed the authorized maximum benefits. 	
SECTION VI - CAUTION	
<p>I understand that -</p> <ol style="list-style-type: none"> 1. I may be qualified for the SEL RES MGIB and for a bonus under the Selected Reserve Incentive Program (<i>SRIP</i>), or other incentives such as loan repayments, at the time of my enlistment, reenlistment, or extension in the Army National Guard of the United States or the U.S. Army Reserve; and 2. I am authorized to reenlist or extend at any time during a current enlistment or reenlistment agreement to qualify for the SEL RES MGIB; and 3. Regulations governing eligibility for a bonus under the SRIP may specify that the reenlistment or extension must be accomplished within a certain specified period prior to the expiration of term of service (<i>ETS</i>); and 4. If I reenlist or extend to qualify for the SEL RES MGIB when I am not within the specified period prior to my ETS date, I will be ineligible for a SRIP bonus. 	
SECTION VII - TERMINATION OF ENTITLEMENT	
<p>_____ (<i>Soldier must initial</i>) I have read the following and I understand that my entitlement to educational assistance will be terminated under any of the following conditions:</p> <ol style="list-style-type: none"> 1. If I am declared an unsatisfactory participant per AR 135-91. 2. If I am discharged or separated from the Selected Reserve except -- <ol style="list-style-type: none"> a. To accept appointment as a commissioned officer or warrant officer with concurrent assignment to the Selected Reserve. b. To vacate my commission and enlist with concurrent assignment to the Selected Reserve. c. For disability that occurred after my eligibility date and which is not the result of my own misconduct. d. During the period 1 October 1991 and ending on 30 September 1999, if I am involuntarily separated from the Selected Reserve, except under the conditions cited below, I will retain my entitlement to educational assistance under the SEL RES MGIB until expiration under 5, below. The term "involuntarily separated" refers to separation from a paid position in the Selected Reserve. If separated during this period I will be considered as being involuntarily separated except where I am discharged, transferred, or reassigned from the Selected Reserve as a result of the following reasons: <ol style="list-style-type: none"> (1) For early retirement. (2) As a result of unsatisfactory participation, or unsatisfactory performance, or under other adverse conditions including a transfer with a tentative characterization of under other than honorable conditions. 	

NAME		SSN	
SECTION VII - TERMINATION OF ENTITLEMENT (Continued)			
<p>(3) If I fail to meet qualifications for membership in the Selected Reserve under law or regulations, to include medical fitness standards.</p> <p>(4) If I am immediately eligible for retired pay under any provision of law based on military service.</p> <p>(5) If I am immediately eligible for an unreduced annuity under the Civil Service Retirement and Disability System or the Federal Employees Retirement System and I am serving as a military technician.</p> <p>(6) If I am eligible for separation pay.</p> <p>(7) If I refuse to accept another position in the Selected Reserve (<i>USAR or ARNGUS</i>) which was offered to me and it was within reasonable commuting distance of my home or, if outside reasonable commuting distance, was located at or in close proximity to the location of the unit with which I had been affiliated, and did not require a reduction in my grade.</p> <p>(8) If I voluntarily enter on extended active duty in the Active Army, or if I enlist or accept an appointment in a Regular component or another Reserve component for continued service in the Selected Reserve.</p> <p>(9) If I am not assigned, at the time of transfer or discharge, to an authorized position in the Selected Reserve which qualified me for basic pay or compensation for inactive duty training.</p> <p>(10) If I am fully qualified for reenlistment or extension on the date my current enlistment expires, and I request immediate reenlistment, but nevertheless I am discharged.</p> <p>3. If I enter on active duty, or full-time active duty under the Active Guard Reserve program.</p> <p>4. If I receive financial assistance under an ROTC scholarship program (<i>10 USC 2107</i>).</p> <p>5. When I complete a 10-year period which begins on the date I become entitled to assistance under the Montgomery GI Bill, except as provided for by the Department of Veterans Affairs.</p>			
SECTION VIII - RECOUPMENT			
I understand that if I receive financial education assistance and lose entitlement due to unsatisfactory participation I may be required to refund part of the educational assistance I received, plus interest. The amount of recoupment will be determined by the Department of Defense and the Department of Veterans Affairs.			
SECTION IX - UNDERSTANDING			
I have read and understand each of the sections above, have had my questions answered satisfactorily, and understand the Selected Reserve Montgomery GI Bill eligibility requirements, benefits, entitlement procedures, and caution.			
DATE SIGNED		APPLICANT'S SIGNATURE	
SSN		TYPED OR PRINTED NAME AND RANK	
SECTION X - CERTIFICATION BY SERVICE REPRESENTATIVE			
I certify that I have witnessed the reading and signing of the above agreement and the signature appearing above is that of the applicant.			
DATE SIGNED		SIGNATURE OF SERVICE REPRESENTATIVE	
TITLE		TYPED OR PRINTED NAME AND RANK	

OFFICER SERVICE AGREEMENT
SELECTED RESERVE EDUCATIONAL ASSISTANCE PROGRAM
(SHORT TITLE: MONTGOMERY GI BILL)

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Chapter 1606, title 10, USC, and section 552a, title 5, USC
PRINCIPAL PURPOSE: Officer service agreement for Selected Reserve Montgomery GI Bill.
ROUTINE USES: Officers must obligate 6 years Selected Reserve service in addition to any current Selected Reserve obligation. For use by Selected Reserve officers of the Army National Guard of the United States (ARNGUS) and U.S. Army Reserve (USAR). Upon completion, file as a permanent document in the DA Form 201 file (MPRJ).
DISCLOSURE: Disclosure of your social security number is voluntary.

SECTION I - SERVICE AGREEMENT

1. I have read and executed DA Form 5435-R (*Statement of Understanding - The Selected Reserve Montgomery GI Bill (10 USC Chapter 1606)*) and I am otherwise fully qualified to participate in the Selected Reserve Montgomery GI Bill.
2. In consideration for issuance of DD Form 2384 (*NOBE*) and the benefits available from the Selected Reserve Montgomery GI Bill, I hereby agree to serve for a period of 6 years in the Selected Reserve of the ARNGUS or USAR in addition to any current period of obligated Selected Reserve service.

SECTION II - AUTHENTICATION

TYPED OR PRINTED NAME AND RANK OF SERVICE MEMBER
(Last, First, MI)

SSN

APPLICANT'S SIGNATURE

DATE SIGNED

TYPED OR PRINTED NAME AND RANK OF WITNESSING
OFFICIAL (Last, First, MI)

SSN

SIGNATURE OF WITNESSING OFFICIAL

DATE SIGNED

AGREEMENT HEALTH PROFESSIONALS LOAN REPAYMENT (HPLR) For use of this form, see AR 135-7; the proponent agency is ODCSPER	CONTROL NO.
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DATA REQUIRED BY THE PRIVACY ACT OF 1974

Authority: 10 USC 275, 5 USC 301, 10 USC 2013, 10 USC 2172.
Principal Purpose: To explain HPLR and record agreement.
Routine Uses: To confirm requirements for HPLR.
Disclosure: Disclosure of your SSN is voluntary; however, if not provided, you will be ineligible for HPLR.
NAME _____ **SSN** _____

SECTION I—GENERAL

The appointing/commissioning official must explain these requirements. One completed copy of the form will be placed in the OMPF, one copy in the MPRJ, and one copy given to the officer.

SECTION II—ELIGIBILITY

With my appointment/commission in the ARNG or USAR, I meet the following criteria for the HPLR program:

1. I am/will be performing as an officer in a Selected Reserve unit of the ARNG or USAR.
2. The Army Surgeon General has determined that I am qualified for service in critical medical/nursing specialty _____ (List one of the approved specialties)
3. I have a current, valid medical/nursing license and, if required, specialty certification to practice and am in good standing in my profession.
4. I was first appointed/commissioned in the Medical or Nurse Corps after 30 September 1985.
5. I must remain in the Selected Reserve in good standing to obtain loan repayments. I understand that the maximum aggregate amount of repayments under this agreement is \$3,000 per year up to \$20,000 HPLR program maximum.

SECTION III—REPAYMENTS

6. The anniversary date will be determined based upon the date this agreement is signed. Each complete satisfactory year of service performed under this agreement establishes an anniversary date. On each anniversary date, my unit will initiate a request for repayment on eligible loans. On an anniversary date, any loan will be considered eligible that:
 - a. Has been secured on or after 1 Oct 75 and made, insured, or guaranteed under Part B or E of the Higher Education Act of 1965 (GSL, FISL, NDSL, ALAS loans) or a health education assistance loan (HEAL) made or insured under Part C of Title VII of the Public Health Service Act.
 - b. Has an outstanding balance on the principal.
 - c. Is not default.
 - d. Has been secured for at least one year prior to current anniversary date.
7. Each anniversary date, the designated portion for repayment will be established on eligible loans as follows: \$3,000 maximum aggregate per year or the remaining balance, whichever is less. The following restrictions apply:
 - a. The repayment cannot exceed the outstanding balance.
 - b. This agreement does not change my obligations to the lender or note holder, if I am declared in default by the lender/holder, I will not be eligible for loan repayments.
 - c. Payments already made cannot be reimbursed.
8. If I am separated from the Selected Reserve to enter active duty, I may be eligible for partial repayment. The repayment will be prorated based on the satisfactory time (whole months) served that anniversary year.
9. It is my responsibility to notify my unit of loans I have secured. I will furnish my unit copies of each promissory note. Sixty days prior to my anniversary date, I will coordinate with my unit to process the necessary documentation to confirm loan repayment status and initiate repayment procedures.

SECTION V—TERMINATION

10. I understand my eligibility will continue unless terminated because I:
 - a. become an unsatisfactory participant
 - b. am separated from the Selected Reserve
 - c. enter the Inactive National Guard or Individual Ready Reserve
 - d. transfer to a medical/nursing specialty not designated as a critical specialty (Section II of this Agreement).
 - e. am not currently licensed or certified in the critical medical/nursing specialty designated in this Agreement.
 - f. am not currently licensed or certified in the critical medical or nursing specialty in which currently performing.

SECTION VI—RECOUPMENT

11. In the case of an erroneous certification or payment, the total amount erroneously paid will be recouped.

SECTION VII—STATEMENT OF UNDERSTANDING AND AGREEMENT

I understand and agree to the provisions contained in this Agreement. Any other promises, representations, or commitments made to me in connection with this Agreement are written below in my own handwriting. If none, write "NONE" below.

SECTION IV—AUTHENTICATION

UNIT	TYPED NAME OF OFFICER
ADDRESS	SIGNATURE
TYPED NAME OF APPOINTING COMMISSIONING OFFICIAL	SSN
OFFICIAL'S SIGNATURE	DATE

STATEMENT OF UNDERSTANDING AND SELECTED RESERVE SERVICE AGREEMENT
BASIC EDUCATIONAL ASSISTANCE ENTITLEMENT FOR SERVICE IN THE SELECTED RESERVE
(SHORT TITLE: MONTGOMERY GI BILL 2 X 4 PROGRAM)

For use of this form, see AR 135-7; the proponent agency is ODCSPER.

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: Title 38, USC, chapter 30, and Executive Order 9397 dated 22 November 1943

PRINCIPAL PURPOSE: To explain the eligibility requirements for increased educational assistance benefits under the Montgomery GI Bill 2 x 4 Program; to ensure your understanding of the conditions for entitlement is a matter of record; and to provide a record of your agreement to serve in the Selected Reserve.

ROUTINE USES: Provide information on the increased educational assistance benefits incurred by Selected Reserve service and to verify a soldier's agreement to serve in the Selected Reserve.

DISCLOSURE: Disclosure of your social security number is voluntary; however, if not provided, you will not be eligible for increased educational assistance benefits under the Montgomery GI Bill 2 x 4 Program.

PART ONE, STATEMENT OF UNDERSTANDING

1. INSTRUCTIONS

a. This Statement of Understanding will be read and signed by each soldier who, on release from 24 months of active duty, is entitled to basic educational assistance under the Montgomery GI Bill 2 x 4 Program.

b. The witnessing official will verify the soldier's entitlement and eligibility for membership in the ARNGUS or USAR Selected Reserve; explain the terms and obligations of Selected Reserve service and the increased benefits that can be earned by such service.

2. STATEMENT OF UNDERSTANDING

I have earned entitlement to basic educational assistance under the Montgomery GI Bill 2 x 4 Program. I have completed, or am within 30 days of completing, my initial 24 months active duty obligation.

I understand --

a. I can become eligible for the maximum basic educational assistance benefits as determined by the Department of Veterans Affairs by serving continuously in the Selected Reserve for 4 years.

b. To be eligible for the maximum basic educational assistance benefits I must become a member of the Selected Reserve on release from active duty, or within 12 months following my release from active duty.

c. If I elect Selected Reserve membership, I may be required to be appointed, enlisted, or reenlisted so that I can serve for 4 years in the Selected Reserve.

d. Service in the Selected Reserve means membership in a unit of the Army National Guard of the United States (ARNGUS), a U.S. Army Reserve (USAR) troop program unit, assignment as USAR soldier to an Individual Mobilization Augmentee position, or service on full-time active duty or full-time National Guard duty in an Active Guard Reserve status.

e. Even if I elect Selected Reserve membership, such membership cannot be guaranteed. The availability of a Selected Reserve assignment is based on my residence, grade, and occupational specialty.

f. If I elect Selected Reserve participation, am assigned to the Selected Reserve, and then fail to satisfactorily serve the 4 years, I will lose entitlement to the maximum educational assistance benefits but will retain entitlement to less than maximum educational assistance benefits in amounts determined by the Department of Veterans Affairs.

☐ I REQUEST A SELECTED RESERVE ASSIGNMENT

☐ I DECLINE MEMBERSHIP IN THE SELECTED RESERVE

DATE SIGNED

APPLICANT'S SIGNATURE

SSN

TYPED OR PRINTED NAME AND RANK

NAME	SSN
I certify the person whose signature appears above is eligible for basic educational assistance benefits and has completed an initial active duty obligation of 24 months, or is within 30 days of such completion. I have answered all questions to the best of my ability and have explained the obligations incurred by Selected Reserve participation.	
DATE SIGNED	SIGNATURE OF WITNESSING OFFICIAL
TYPED OR PRINTED NAME AND RANK	
PART TWO, SELECTED RESERVE SERVICE AGREEMENT	
<p>1. INSTRUCTIONS:</p> <p>This Selected Reserve Service Agreement will be completed ONLY when an applicant:</p> <ul style="list-style-type: none"> a. Agrees to serve in the Selected Reserve for entitlement to the maximum basic educational assistance benefits. b. Is eligible for assignment to the Selected Reserve, to include appointment, enlistment, or reenlistment if appropriate and required. c. Has read and signed Part One (<i>Statement of Understanding</i>) above. d. Has a confirmed assignment in a position vacancy of the Selected Reserve. <p>2. SELECTED RESERVE SERVICE AGREEMENT:</p> <p>I hereby agree to serve for at least 4 years in the Selected Reserve to earn entitlement to the maximum basic educational assistance benefits offered by the Department of Veterans Affairs under the Montgomery GI Bill 2 x 4 Program. In connection with this agreement, I understand:</p> <ul style="list-style-type: none"> a. To become a member of the Army National Guard of the United States I must be appointed, or enlisted, as appropriate. b. If I have insufficient time remaining on my statutory or contractual service obligation, or if I have been discharged, I must be appointed, enlisted, or reenlisted in the U.S. Army Reserve, as appropriate. c. I must serve satisfactorily as prescribed by National Guard or Department of the Army regulations for the obligated 4 years. d. My entitlement to 36 months of basic educational assistance benefits under the Montgomery GI Bill 2 x 4 Program is limited to 10 years from the date of my release from active duty, or the date on which the 4-year Selected Reserve requirement is met, whichever is the later. However, there are provisions in law which provide exceptions or extensions to the 10-year limitation that are administered by the Department of Veterans Affairs. e. I will retain entitlement to the maximum basic educational assistance benefits if, prior to completing the 4 years of Selected Reserve service, I am discharged or released from service in the Selected Reserve for any of the following reasons: <ul style="list-style-type: none"> (1) A service-connected disability. (2) A medical condition which preexisted my becoming a member of the Selected Reserve and iwhich the Secretary determines is not service connected. (3) Hardship. (4) Discharged or released after 30 months of the Selected Reserve service for the convenience of the Government. (5) Involuntarily discharged or released for the convenience of the Government as a result of a reduction in force. (6) A physical or mental condition not characterized as a disability not resulting from own misconduct. (7) Cease to be a member of the Selected Reserve during the period beginning on 1 October 1991 and ending on 30 September 1999, by reason of inactivation of my Selected Reserve unit of assignment or by reason of involuntarily ceasing to be designated as a member of the Selected Reserve pursuant to 10 USC 10143(a). 	

NAME		SSN	
PART TWO, SELECTED RESERVE SERVICE AGREEMENT <i>(Continued)</i>			
<p>f. The continuity of Selected Reserve service shall not be considered as broken if I am assigned to the Individual Ready Reserve or the Inactive National Guard for a period not to exceed 12 months based on the following reasons:</p> <p>(1) I am released from Active Guard Reserve status and I am pending reassignment to another Selected Reserve category.</p> <p>(2) I am transferred to the Individual Ready Reserve or Inactive National Guard for cogent personal reasons based on hardship or employment. This is provided my reasons have been verified and my transfer was approved by the appropriate authorities.</p> <p>g. Except for the provisions of paragraphs e and f above, if I am separated from the Selected Reserve before I complete 4 years, I will terminate my eligibility for the maximum basic educational assistance benefits, but will retain my entitlement to basic educational benefits. I will be subject to refund any unearned portion of the maximum benefits. One month of the maximum benefit is earned for each 4 months of Selected Reserve service.</p>			
DATE SIGNED		APPLICANT'S SIGNATURE	
SSN		TYPED OR PRINTED NAME AND RANK	
<p>I certify the person whose signature appears above is eligible for assignment, appointment enlistment, or reenlistment, as appropriate, for service in the Army National Guard of the United States, or U.S. Army Reserve, with concurrent assignment to a Selected Reserve position vacancy. I further certify this applicant has been, or is being, assigned to a confirmed position vacancy in the Selected Reserve.</p>			
DATE SIGNED		SIGNATURE OF WITNESSING OFFICIAL	
TYPED OR PRINTED NAME AND RANK			

**NEW SPECIALIZED TRAINING ASSISTANCE PROGRAM (New STRAP)
SERVICE AGREEMENT**

For use of this form, see AR 135-7; the proponent agency is ODCSPER

CONTROL NUMBER

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 10 USC 2128

PRINCIPAL PURPOSE: To explain the obligation and training requirements incurred by participation in the New STRAP and to ensure that agreement to these conditions is a matter of record.

ROUTINE USES: Confirmation of obligation and training requirements incurred by participation in the New STRAP; occasionally used as a basis of suspension, termination, and recoupment if the conditions and requirements are not met.

DISCLOSURE: Disclosure of requested information is voluntary, however, if not provided your application can not be processed or approved.

APPLICANT'S LAST NAME

FIRST

MIDDLE

SOCIAL SECURITY NO.

I. APPLICABILITY

THIS AGREEMENT WILL BE COMPLETED BY ALL SELECTED APPLICANTS FOR THE New STRAP.

II. INSTRUCTIONS

The service representative is responsible for explaining the New STRAP requirements and obligations outlined on this form. Following the explanation and affixing of proper signatures, a copy will be submitted to the New STRAP Manager at U.S. Army Health Professional Support Agency, ATTN: SGPS-PD, 5109 Leesburg Pike, Falls Church, VA 22041-3258 for certification and appropriate distribution. Copies will be filed in the officer's official military records.

III. ACKNOWLEDGEMENT

In connection with my selection to participate in the New STRAP. I hereby acknowledge that I meet the following eligibility criteria:

1. I am a citizen of the United States of America.
2. Upon acceptance into the New STRAP, I will accept an appointment as a Reserve of the Army officer, if tendered, with assignment to the Medical Corps or Army Nurse Corps in a grade determined appropriate by the U.S. Army, for service in the Ready Reserve (either ARNG or USAR). (If I am currently a Reserve commissioned officer assigned to the Medical Corps or Army Nurse Corps, as appropriate, no new appointment will be tendered.)
3. I have a current and valid license to practice, if required.
4. If I am currently a commissioned officer, I have not twice failed to be recommended for promotion to the next higher grade, nor was I not recommended for promotion to the next higher grade by the last board of officers which considered my records from in or above the promotion zone.
5. I will be able to fulfill the Ready Reserve obligation I will incur by my participation in the New STRAP prior to my mandatory removal from active duty based on age or length of service.
6. I have been accepted for, or I am attending in good standing, the approved course of specialized advance training in the critical medical or nursing specialty listed below, at the institutions indicated:

IV. OBLIGATION

As a participant in the New STRAP receiving financial assistance during my specialized training program I agree to --

1. Comply with and meet all academic, medical, administrative, and other standards and requirements outlined in my specialized training program and applicable regulations, directives and instructions issued by the U.S. Army.
2. Advise the New STRAP Manager and my commander of any changes in my status which may affect my eligibility to receive financial assistance.

LAST NAME

SSN

This includes my training program status and academic standing, health status, and personal information status to include marital status, address, and telephone number.

3. Remain in the Ready Reserve. It is my option to participate as a member of a troop program unit of the ARNG or USAR, as an individual mobilization augmentee (IMA), or as a member of the Individual Ready Reserve (IRR). However, once I have selected my option, I may not change my election without the express written consent of the New STRAP manager. I further agree to participate in the designated training applicable to my assignment and otherwise maintain membership in good standing in the Ready Reserve.
4. Continue to participate in the New STRAP and complete my specialized training unless I am terminated by Headquarters, Department of the Army for any of the reasons cited in Section VI of this agreement. If I am terminated for a reason under Section VI I may be ordered to reimburse the U.S. Government in an amount equal to the total amount of the stipend paid to me, including any applicable accrued interest at the current interest rate, or I may be required to serve on active duty for 1 year for each year (or part thereof) for which I received a stipend. In the event that my participation in New STRAP is terminated and the Secretary of the Army (or his designated representative) orders me to active duty in lieu of reimbursement, I agree to serve 1 year of active duty for each year or part thereof for which I received a stipend under New STRAP. Also, I may be required to remain in the Ready or Selected Reserve, as applicable under the terms of this agreement, in lieu of being ordered to active duty, and I may be required to reimburse the U.S. Government for the total amount of the stipend paid to me even though I have been required to remain in the Ready or Selected Reserve.
5. Incur an obligation to serve in the Ready or Selected Reserve on successful completion of the specialized training program in return for the financial assistance I receive under the New STRAP. I hereby further agree to fulfill my service obligation, after I complete my specialized training, in **(the applicant must initial the appropriate selection) --**
 - a. (initial) the IRR. By accepting this agreement I will be entitled to a monthly stipend during my specialized training program at the rate of 1/2 of that paid to officers participating in the Armed Forces Health Professions Scholarship Program (see sec V below). In return, I will serve 2 years in the IRR for each year or part thereof for which I received a monthly stipend. I also agree to serve not less than 30 days of initial active duty for training (IADT) and not less than 5 days of active duty for training (ADT) each year during the period of required service.
 - b. (initial) a troop program unit of the ARNG or USAR or as an individual mobilization augmentee (IMA). By accepting this agreement I will be entitled to a monthly stipend during my specialized training program at the rate paid to officers participating in the Health Professions Scholarship Program (see sec V below). In return, I will serve 2 years in a troop program unit of the ARNG or USAR or as an IMA for each year or part thereof during which I received a monthly stipend. I also agree to serve not less than 12 days of ADT each year during the period of required service.
6. (The service representative will provide the applicant with the information necessary for entry in the following blanks.) I am scheduled to commence participation in the New STRAP on _____. I am scheduled to complete my specialized training and New STRAP participation on _____. Therefore, if I receive a stipend during this period, the service obligation I incurred by participation in the New STRAP will end on _____. The statutory military service obligation that I incurred on initial entry in the U.S. Armed Forces under section 651, title 10, United States Code (10 USC 651), ended on _____, or will end on _____. I will be required to fulfill the terms of this agreement even if the term of service extends beyond the termination of my statutory military service obligation.

On successful completion of my specialized training and New STRAP participation, I further understand and agree that I will not begin discharging my New STRAP obligation until successful completion of the specialized training and that such discharge will continue, uninterrupted until my obligation is fully satisfied unless I am sooner separated or discharged at the discretion of HQDA, or unless the method of satisfaction of my obligation is altered by my voluntary participation in other educational or training programs, or by a change of component or duty status. I further agree that --

1. After completion of the specified training, if I fail to maintain satisfactory participation in the Ready Reserve, I may be subject to disciplinary action under the Uniform Code of Military Justice and to such administrative measures or sanctions as may be appropriate under existing regulations, including subjection to recoupment of the total amount stipend paid to me plus applicable interest and that I may be ordered to active duty for a period not to exceed 2 years.

LAST NAME**SSN**

2. After completion of the specified training, if I am voluntarily or involuntarily ordered to active duty (including service in an Active Guard Reserve (AGR) status), such service will satisfy my Ready Reserve obligation under this agreement, as follows:
 - a. One whole year of service on active duty will satisfy the incurred obligation for each year, or each fraction of a year, for which I received financial assistance under the New STRAP. Time spent in graduate professional education (for example, residencies, fellowships) while on active duty, will not be creditable toward satisfying the obligation I incurred under this agreement. Service on active duty for periods of less than a whole year will not receive 1-for-1 credit, but will be credited as though it was service not on AD.
 - b. If I serve part of my obligation on active duty and part of my obligation in the Ready Reserve not on active duty, each such period of duty will be computed at the rate stipulated in this agreement (i.e., 1 complete year of active duty for 1 year of financial assistance or 2 years of nonactive service for 1 year of financial assistance).
 - c. Periods of duty on annual training (AT), ADT, active duty for special work, or temporary tour of active duty, as described in AR 135-200 and AR 135-210, will not be computed as active duty for the purpose of permitting satisfaction of my obligation on a 1-for-1 basis. Such tours of duty will satisfy my obligation on the same basis and at the same rate as service in a TPU, the IRR, or as an IMA, not on active duty (that is, 2 years of service for each year of participation).

V. ENTITLEMENT

If I continue to meet the eligibility criteria that I acknowledge in section III above, have agreed to fulfill the terms of my obligation, and am accepted into the New STRAP, I am eligible for a monthly stipend at the rate, or at half of the rate, paid to participants in the Armed Forces Health Professions Scholarship Program, according to the terms of the obligation I have agreed to (para 5, IV above). The amount of the monthly stipend paid to officers in the Armed Forces Health Professions Scholarship Program is prescribed by the Department of Defense Military Pay and Entitlements Manual, part 8, chapter 5. This rate is subject to annual increases on 1 July of each year, as determined by the Secretary of Defense. I understand that --

1. Payment of the stipend commences on the date that all of the following conditions are met:
 - a. I am appointed a commissioned officer designated or assigned for service in the Medical Corps or Army Nurse Corps as appropriate to the training in which I am participating;
 - b. I am assigned to the Ready Reserve, and that I am not serving on AGR status;
 - c. This service agreement is completed and appropriate signatures are affixed;
 - d. I am enrolled in an approved specialized course of study.
2. The stipend is prorated for portions of a month at the beginning and end of my course of specialized training.
3. Payment of the monthly stipend will cease on suspension or termination from New STRAP, on removal from the Ready Reserve, or on completion of the specialized training program.

VI. TERMINATION

I agree that --

1. I will continue to participate in the New STRAP unless such participation is terminated by Headquarters, Department of the Army.
2. Termination may only be effected for one or more of the following reasons:
 - a. If I fail to successfully complete the specialized training program specified above, if I am released from the training program, or if I voluntarily stop training.
 - b. If I fail to meet or maintain the eligibility requirements in section III above.
 - c. If I am convicted of --
 - (1) A felony as defined under Federal, State, or local law; or
 - (2) An offense which if tried under the Uniform Code of Military Justice could result in a sentence of at least 1 year confinement or a dishonorable discharge; or
 - (3) An offense involving moral turpitude, including sexual offenses and acts involving dishonesty.
 - d. If I commit one or more acts resulting in discreditable involvement with civilian or military authorities, whether or not I am charged, indicted, tried, or convicted of such acts.

LAST NAME

SSN

- e. If I become an unsatisfactory participant in the Ready Reserve (AR 135-91).
 - f. If I exceed the maximum period authorized for suspension in section VII below, or following a period of suspension, I am not reinstated in the New STRAP (see sec III above).
 - g. If I apply for conscientious objector status.
 - h. If I am terminated from the Program in the best interest of the Government by Headquarters, Department of the Army.
3. I may not unilaterally terminate my participation in the New STRAP, or in the Ready Reserve, and that my refusal to accept any monetary or other benefits under this contract will not effect a termination of my membership in the New STRAP or the Ready Reserve.
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VII. SUSPENSION

I understand that under certain conditions my entitlement to a stipend and participation in the New STRAP may be suspended, in lieu of termination, at the discretion of the Office of The Surgeon General, for a specified period of time. Except under extraordinary circumstances, only one such suspension may be granted.

- 1. A suspension will be imposed if I am transferred from the Ready Reserve to the Standby Reserve for one of the following reasons:
 - a. As a key employee. Period of suspension may not exceed 3 years.
 - b. For temporary hardship. Period of suspension may not exceed 1 year.
 - c. For temporary medical disqualification. Period of suspension may not exceed 1 year.
 - d. As a result of oversea residency or missionary obligation. Period of suspension may not exceed 3 years.
 - e. As determined by the Secretary of the Army or his designee. Period of suspension may not exceed 2 years.
- 2. A suspension will also be imposed if I am placed under suspension of favorable personnel actions under the provisions of AR 600-8-2. During a suspension for this reason, I understand that I may continue to be required to satisfactorily participate in the Selected Reserve (if so assigned) and that I will be paid for such participation; however, I will not continue to receive stipend payments. I understand that, if I am otherwise eligible, stipend payments may resume when the suspension has been lifted. Maximum authorized period of such suspension is 1 year.
- 3. If I am required to participate in unit training and I have been approved for transfer to the IRR for personal cogent reasons, I may be granted a suspension for a period not to exceed 1 year.

I understand and acknowledge that if I exceed the period of time authorized by the Office of The Surgeon General for a suspension, my participation in the New STRAP may be terminated and I may be ordered to active duty or required to reimburse the Government for the stipend payments I received at the option of the Secretary of the Army. Reinstatement in the New STRAP, following a period of suspension, is at the discretion of the Office of The Surgeon General. In the event that I am not reinstated in the New STRAP, I will be terminated at the discretion of the Office of The Surgeon General, as indicated in section VI above.

VIII. RECOUPMENT

I understand that I may be required, at the option of the Secretary of the Army, to reimburse the Government for the total amount of stipend paid to me, including any applicable accrued interest at the current interest rate, if I am terminated from New STRAP under section VI above. I specifically acknowledge that any reimbursement made to the Government by me or on my behalf will not reduce or eliminate my obligation under this agreement to serve in the Ready Reserve for the period specified in section IV, paragraph 5a or b (as applicable) above. I also understand that the Government may lawfully recoup any amounts erroneously paid to me. I further agree that following completion of the specified training, if I fail to satisfactorily complete the period of obligated service described in section IV above, I may be ordered to reimburse the Government for the total amount of the stipend paid to me including accrued interest, in accordance with applicable laws, regulations, and directives.

LAST NAME	SSN
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IX. STATEMENT OF UNDERSTANDING

I understand and agree to the provisions of this agreement. Any other promises, representations or commitments made to me in connection with my participation in the New STRAP or appointment as a Reserve of the Army are written below in my own handwriting. (If none, write "NONE" below.)

TYPED OR PRINTED NAME AND RANK	SOCIAL SECURITY NUMBER
APPLICANT'S SIGNATURE	DATE SIGNED

X. CERTIFICATION OF SERVICE REPRESENTATIVE

I certify that I have witnessed the reading and signing of the above agreement and the signature appearing thereon is that of the officer. No other promises were made to the applicant as a condition of New STRAP entitlement.

TYPED OR PRINTED NAME AND RANK OF SERVICE REPRESENTATIVE	TITLE
SIGNATURE OF SERVICE REPRESENTATIVE	DATE SIGNED

ACCEPTED AND APPROVED FOR PARTICIPATION IN THE New STRAP

NEW STRAP MANAGER	DATE
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